

Global Guide 2014

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INTRODUCTION TO EDUCATIONUSA

Mission and Structure: Supported by the U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA), the EducationUSA network consists of advising centers in nearly every country of the world. ECA's mission is to build mutual understanding between the people of the United States and the people of other countries. The EducationUSA network supports this mission by increasing international student mobility. EducationUSA advisers work in U.S. embassies and consulates and in partner institutions that include Fulbright commissions, bi-national cultural centers, U.S. nongovernmental organizations (NGOs), foreign NGOs, and foreign universities and libraries. Advisers help international students and their families navigate the U.S. college admissions process by providing accurate, comprehensive, and current information about the full range of accredited U.S. institutions of higher education.

Over 2,202 institutions /
4,496 U.S. higher ed
professionals enjoy login
access to EducationUSA

4,700+
subscribers to
the HEI eNews

Regional Educational Advising Coordinators (REACs): Regional educational advising coordinators (REACs) develop and guide advisers in the EducationUSA network, which is organized into six geographic regions: East Asia and Pacific (EAP), Europe and Eurasia (EUR), Middle East and North Africa (NEA), South and Central Asia (SCA), Sub-Saharan Africa (AF), and the Western Hemisphere (WHA). REACs provide assessment, training, and guidance to advising centers to maintain and improve the quality of their work. Regional coordinators also serve as resources on local educational systems and the development of strategies for increasing international student mobility for the U.S. higher education community. For an up-to-date list of REACs and their contact information, visit our website: www.EducationUSA.state.gov.

Programs and Services: EducationUSA Advising Centers offer a variety of services to assist both international students and the U.S. higher education community. For international students, advising centers provide group advising sessions, virtual advising, individual appointments, pre-departure orientations, and information about the U.S. higher education system and individual institutions. The U.S. higher education community can look to the EducationUSA network for advice about developing regional and country-specific recruitment strategies, creating programs and products to connect with students, and obtaining information about application and admission issues. EducationUSA advisers also use their expertise to help U.S. institutions develop relationships with local universities and schools for study abroad programs.



1,291,507

Unique visitors
to the EducationUSA website
in 2013

Over
500

Weekly Update
stories from U.S.
institutions in 2013

“Your 5 Steps to U.S. Study”: EducationUSA’s *Your 5 Steps to U.S. Study* guides international students through the application and admission processes for undergraduate, graduate, and English-language programs, as well as short-term educational opportunities at U.S. colleges and universities. It gives students a timeline and practical tips to navigate the process. *Your 5 Steps to U.S. Study* is available online at www.EducationUSA.state.gov and as a 3-D avatar-guided Facebook app at <http://ow.ly/uKZ4T>

U.S. Study Abroad: EducationUSA advisers around the world are experts in understanding national education systems, and many have good relationships with local universities and schools. If you are considering establishing or expanding study abroad programs, contact an EducationUSA adviser in your target country to find out more about the information and services they may offer.

SERVICES FOR U.S. HIGHER EDUCATION INSTITUTIONS

As a global network, EducationUSA offers a variety of services to assist U.S. higher education institutions with international student recruitment. Institutions can develop international enrollment plans and reach students around the world with the help of EducationUSA. They can also explore how the network can help recruit, enroll, connect, and engage with international students at www.EducationUSA.state.gov.

RECRUIT AND ENROLL

The EducationUSA network offers expert insight on student mobility trends and recruitment opportunities from the field that is not generally available to the public. It provides access to resources and services designed to enhance international enrollment management strategies. If you are a U.S. higher education professional, EducationUSA can help you research the options; make the case for internationalization of your campus; raise your profile; and provide pre-departure orientation information to your international students. Connect and engage with EducationUSA today.

Research: Gain access to research and expertise on education systems and credentials, scholarship programs, and student mobility in countries around the world.

- Contact EducationUSA REACs and advisers, your on-the-ground experts.
- Investigate international student funding opportunities and special EducationUSA efforts, such as Opportunity Funds, U.S. Student Achievers Program, Competitive College Clubs, and NeXXt Scholars.
- Consult the *Open Doors Report on International Educational Exchange* and this *EducationUSA Global Guide* for comprehensive data and analysis of student mobility trends.
- Turn to *Open Doors* Country Fact Sheets and advising center pages for essential online admissions tools, including credential information and grading scales.

Make the Case: Find essential recommendations for an effective international enrollment management plan on campus.

- Communicate to your institution's leadership the value

of international students to U.S. public diplomacy.

- Enhance international student success on campus by providing essential student services.
- Tailor your institution's website for an international audience.

Raise Your Profile: Increase your institution's global visibility and outreach.

- Connect to the U.S. Department of State's global advising network by posting the EducationUSA logo on your institution's website.
- Interact with hundreds of thousands of prospective students through EducationUSA recruitment fairs and international events.
- Showcase your expertise by making presentations on EdUSA Connects webinars for students and advisers. EdUSA Connects webinars allow you to serve as an expert guest speaker on topics related to *Your 5 Steps to U.S. Study*. You must have a login to serve as an expert. For more information about EdUSA Connects, visit: <http://ow.ly/uKZl9>.
- Send recruitment materials to advising centers worldwide.
- Announce financial aid and campus news to a global audience via the EducationUSA Weekly Update. The *Weekly Update*, distributed each Monday to the EducationUSA network, allows you to announce scholarships and other noteworthy news of particular interest to international students. EducationUSA advisers distribute the *Weekly Update* across social media channels and email lists, and post them in advising centers. They are also available to students through RSS feeds and a searchable web database. Each month, *Weekly Update* posts are clicked on more than 20,000 times across the world.
- Submit a YouTube video of your campus for inclusion on the EducationUSA TV channel playlists.
- Leverage state and regional consortia collaboration with the EducationUSA network to promote your institution to students abroad. EducationUSA work with 30 state and regional consortia that promote U.S. cities, states,

and regions as destinations for international students.

Pre-Departure Information: Help incoming international students prepare for study in the United States.

- Find resources to help students understand the U.S. student visa process.
- Direct students to pre-departure orientations in their home countries.

CONNECT AND ENGAGE

In Person: Engage personally with EducationUSA advisers from around the world.

- Join U.S. higher education professionals and advisers from key overseas markets at the annual EducationUSA Forum in Washington, D.C.
- Host EducationUSA advisers for visits and training programs on your campus. Ensuring that advisers have access to current information and skills-based training is essential to the success of the EducationUSA network. The following opportunities are available:
 - **EducationUSA Training Institute:** Each two-week EducationUSA Training Institute comprises a Washington, D.C.-based workshop, with sessions at the U.S. Department of State and campus-based training. Further information, including the application to host on-campus training for EducationUSA advisers, is available online at www.EducationUSA.state.gov.
 - **Campus Visits/Higher Education Conferences:** Experienced advisers represent EducationUSA at a variety of U.S. higher education association conferences each year. During their time in the

United States, advisers have the opportunity to arrange individual or small group visits to colleges and universities in the geographic region where the respective conference is held.

- Offer to contribute to EducationUSA adviser training programs overseas.
- Connect with EducationUSA staff, REACs, and advisers at over a dozen U.S. higher education association conferences and at international conferences.

Virtually: Engage virtually with the global EducationUSA advising network.

- Consult directly with EducationUSA REACs and advisers via email.
- Discuss international student recruitment topics at EdUSA Connects webinars.
- Keep abreast of comprehensive regional updates through EducationUSA newsletters and other online resources.
- Expand outreach through EducationUSA's virtual and social media channels.

FREE LOGIN ACCESS

The U.S. Higher Education section of the EducationUSA website helps institutions develop and refine their international student recruitment strategies. Free logins are available for employees of U.S. postsecondary institutions listed with the Council for Higher Education Accreditation (CHEA) and higher education professional membership associations. A login provides access to many of the benefits listed in the *Recruit and Enroll/Connect and Engage* sections.



Facebook/social network pages

169 pages
988,628 likes

Twitter/micro-blog sites

96 feeds
420,343

**SOCIAL
MEDIA****YouTube/video channels**

41 channels
1,797,335 video views

Blog page views

18 blogs
806,213 page views

SOCIAL MEDIA

Social media and other virtual tools have become indispensable in promoting U.S. higher education abroad and in connecting U.S. institutions to prospective students. The EducationUSA network's social and virtual media channels allow institutions to reach students around the world.

As of early 2014, the cumulative social media impact of EducationUSA channels, pages, feeds, and blogs has expanded dramatically. Across the board, advising centers are embracing social media as an integral part of their advising activities.

These numbers include sites beyond Facebook, Twitter, and YouTube that reflect other dominant social media platforms in a few select countries. For example, Russian-speaking nations use V Kontakte instead of Facebook and, in China, Sina Weibo and Youku are preferred to Twitter and YouTube. Overall, the use of social media has become more widespread and sophisticated, moving from simple website and social media posts to more interactive content on a number of different levels.

Virtual Advising/Social Media: Some centers have been required to use almost exclusively virtual and social media tools for advising. The countries that rely entirely on virtual and social media for educational advising are Iran, Belarus, and Syria.

Trends: The past 12 months represent a high-water mark for EducationUSA social media—not only for the EducationUSA global platforms, but also, more

importantly, at the country and city levels as advising centers truly embrace the power of social media in their outreach to students and U.S. higher education.

Many centers use Facebook to attract students to center activities and organize Facebook groups to communicate with more dedicated corps of student advisees and alumni now studying in the United States or working around the world. Blogs, especially in China, have also risen in popularity dramatically.

EducationUSA and Virtual Fair: For the second year, EducationUSA partnered with CollegeWeekLive (CWL) for a virtual international student college fair during International Education Week (International Students Day). The November 13, 2013 event saw a 68 percent increase in individual attendees from 2012, with 22,821 in attendance during the 14-hour event. Students from 206 countries and territories interacted with representatives from 104 U.S. colleges and universities. Interactions with U.S. institutions totaled 55,000 (up 25 percent from 2012). EducationUSA expects to continue its involvement in these International Students Day fairs in the coming year.

EducationUSA partnered with CWL on the global International Students' Day fair in February 2014, as well as two virtual regional fairs for Asia and Latin America. At each virtual fair, EducationUSA staff presented thematic sessions related to U.S. study. In addition to the CWL partnership, EducationUSA typically participates in Hobsons' Virtual Student Fairs, staffing a virtual booth during three to six regional events per year.

Virtual Outreach of EducationUSA Social Media Properties from 2012 through 2013

Platform/Marker	2012	2013	% change
Facebook/social network page and groups likes/members	573,081	988,628	92%
Twitter/microblog followers	250,865	420,343	70%
YouTube/video channel video views	666,041	1,797,335	172%
Blog page views	527,731	806,213	63%
Total Social Media Contacts	2,017,718	4,012,519	98.9%

GLOBAL RECRUITING STRATEGIES

- Consult regional educational advising coordinators (REACs), the first point of contact for regional and country-specific advice.
- Ask REACs' advice about connecting with education ministries and scholarship-granting bodies in the region.
- Encourage prospective students to connect with EducationUSA advisers early in the application and college search process to save time and ensure accurate information.
- Demystify the U.S. application and admissions process by directing international students to *Your 5 Steps to U.S. Study* at www.EducationUSA.state.gov.
- Conduct market research to find regions or countries that fit your school's recruiting priorities. Take advantage of *The Open Doors Report on International Educational Exchange*, the regional information presented in this guide, and the EducationUSA Center and/or Country Fact Sheets available on our website.
- Visit EducationUSA Advising Centers to make a presentation and gain exposure. REACs and advisers can help you get the most out of your international recruiting trips. Contact the center in advance to arrange a meeting or school visit, present a group session, or attend a college fair.
- Encourage your international alumni to get involved with EducationUSA Advising Centers. Because word-of-mouth is an important factor in building institutional name recognition overseas, alumni can be excellent ambassadors. EducationUSA advisers can assist in setting up alumni presentations.
- Ask current students to promote their school. Recommend that your study abroad students intern or volunteer at EducationUSA Advising Centers to enhance your institution's visibility. On-campus students can also apply to the State Department's Virtual Student Foreign Service Program at <http://ow.ly/uKZSE> and share experiences through blogs, social media, or online projects. Either way, current students can help build name recognition and familiarity.
- Create recruitment strategies with both students and parents in mind. Family members often play an important role in the decision-making process.
- To maximize your travel budget, conduct digital video conferences, Skype meetings, webinars, Watchitoo sessions, or admissions interviews with students through EducationUSA Advising Centers.
- Participate in EducationUSA college fairs around the world to expand your promotional reach.



REGIONAL EDUCATIONAL ADVISING COORDINATORS (REACS)

BUDAPEST, HUNGARY
Cheryl Francisconi

TBD

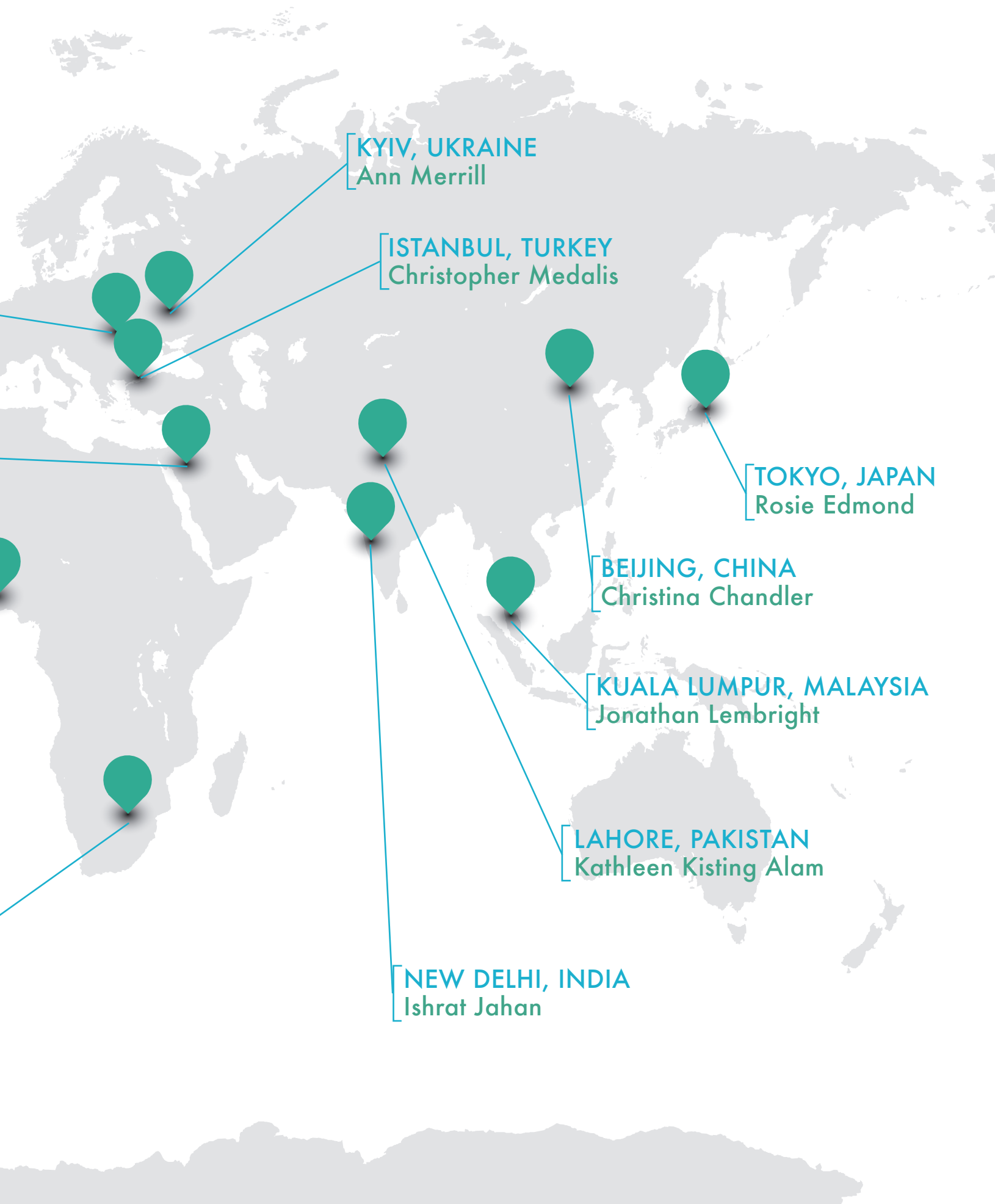
MEXICO CITY, MEXICO
Maria Mercedes Salmon

ACCRA, GHANA
Nancy Keteku

LIMA, PERU
Rosemarie Arens

RIO DE JANEIRO, BRAZIL
Rita Moriconi

JOHANNESBURG, SOUTH AFRICA
Clara Priester



KYIV, UKRAINE
Ann Merrill

ISTANBUL, TURKEY
Christopher Medalis

TOKYO, JAPAN
Rosie Edmond

BEIJING, CHINA
Christina Chandler

KUALA LUMPUR, MALAYSIA
Jonathan Lembright

LAHORE, PAKISTAN
Kathleen Kisting Alam

NEW DELHI, INDIA
Ishrat Jahan

EDUCATIONUSA ADVISING CENTERS: LEVELS OF SERVICE

EducationUSA advising centers in the EducationUSA network provide one of three levels of service: **Comprehensive**, **Standard**, or **Reference**. To find an advising center, visit www.EducationUSA.state.gov.

	Reference	Standard	Comprehensive
Adviser & Center Capabilities			
Adhere to the EducationUSA Principles of Ethical Advising and guidelines on commission or incentive-based recruitment agents	•	•	•
Maintain an up-to-date library of reference books and materials	•	•	•
Offer hours of operation sufficient to meet local demand		•	•
Advisers proficient in English and their local language (if applicable)		•	•
Access video conferencing equipment		•	•
Display U.S. college and university-provided materials		•	•
Foster relationships with local high school counselors and university administrators		•	•
Advising staff with college degree (equivalent to U.S. bachelor's degree)		•	•
Computers with internet access for visitors		•	•
Services to Students			
Pre-departure information/orientations		•	•
Individual advising and information on financial aid		•	•
Organize general U.S. higher education orientation sessions, often featuring visiting U.S. representatives		•	•
Provide virtual advising and consulting through email, social media, instant messenger, webinars, etc.		•	•
Group advising			•
Services to U.S. Higher Education Representatives			
Brief visiting U.S. representatives on the local education system		•	•
Describe and compare U.S. and host country educational systems		•	•
Verify Ministry of Education recognition/certification of local high schools and universities		•	•
Participate in college fairs, hosting the EducationUSA booth		•	•
Organize and participate in alumni group activities and college fairs		•	•
Provides information on local government and foundation scholarships, and other financial aid		•	•
Conduct outreach to local high schools and universities			•
Facilitate communication with local secondary and tertiary institutions			•
Organize public presentations for visiting U.S. representatives at off-site locations			•
Host visiting U.S. representatives for promotional presentations			•

EDUCATIONUSA: BY THE NUMBERS

EducationUSA collects statistics to measure outreach to prospective students through center-based and outreach activities, and virtual and social media platforms. In calendar year 2013, EducationUSA made more than 12 million contacts in the areas listed.

Number of In-Center Contacts, by Type

Number of In-Center Contacts, by Type	Total Contacts
Individual advising appointments	116,758
Advising by phone or SMS (each conversation)	373,923
Advising by email	509,776
Group advising attendees	188,462
Walk-ins/library/computer users	352,355
U.S. institution representatives	6,729
Total:	1,548,003
Number of Event Attendees, by Outreach Activity	Total Participants
Education fairs	527,944
American Corners / Centers	58,296
Local universities/secondary schools	339,055
Other fairs/conferences/seminars	492,974
Host government events	277,440
Embassy/consulate events	19,942
Public locations	30,768
Total:	1,777,912
Number of Virtual/Social Media Contacts, by Type	Total Contacts
Social networks - pages likes, and group members	1,458,295
Video/Video channels video views	1,944,570
Skype Contacts & IM advising calls	14,173
Blog follows	674,911
Twitter/microblog followers	157,587
Digital Video Conferences (DVCs) participants	22,937
EdUSA Connects sessions attendees	10,010
Total social media contacts in 2013	4,282,483
Unique website visitors **	4,453,674
Total:	12,062,072

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

** Includes all centers that reported unique visitors to their center websites.

SUB-SAHARAN AFRICA

Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo Brazzaville, Congo Democratic Republic, Côte d'Ivoire, Djibouti, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mozambique, Namibia, Niger, Nigeria, Reunion, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, St. Helena, Sudan, Swaziland, Tanzania, Togo, Uganda, Zambia, Zimbabwe

51 EducationUSA Advising Centers in the Africa:

32 Comprehensive
14 Standard
5 Reference

REGIONAL EDUCATIONUSA PROFILE

In Sub-Saharan Africa, most EducationUSA advising centers are located in U.S. embassies and consulates. In addition to embassy-based centers in 40 countries, an additional 11 operate at American Spaces or partner institutions in regional capitals. EducationUSA launched new advising centers in 2013 in South Sudan and Equatorial Guinea and reopened centers in Botswana, Kenya, and Tanzania.

EducationUSA is striving to provide access to African students in all 49 independent nations to professional advisers who can guide undergraduate and graduate students through the admissions process and collaborate with U.S. colleagues on recruitment, credential evaluation, local educational systems, university linkages and faculty exchange programs, joint research collaborations, sabbatical placements, and study abroad programs.

Africa's advisers are known for their close personal relationships with students and their families, as they form long-term bonds that carry through the students' educational experiences in the United States to their eventual return home. Centers integrate returned alumni into programs where they serve as the voice of experience. Cohort advising, now active in dozens of countries, produces "the EducationUSA difference" of intensive, focused programs to strengthen the competitiveness of prospective students and broaden their horizons.

This sustained dedication is paying off: last year, the number of African students in the United States

increased by almost two percent, and Africans who used EducationUSA services received more than \$25 million in scholarships and financial aid, enabling thousands to benefit from U.S. higher education.

Africa's 30,585 students are spread across the United States in more than 1,270 institutions in all 50 states, the District of Columbia, and Puerto Rico. Texas, New York, Massachusetts, Maryland, and Pennsylvania are favorite destinations, but adventurous students are eager to seek opportunities wherever they can. 56 percent of African students are in undergraduate programs (of which 72 percent are in four-year institutions and 28 percent in two-year institutions).

Thirty percent of Africans are enrolled in graduate study and the remaining 15 percent are in non-degree programs and optional practical training (OPT) status. The number of Africans enrolled in intensive English study is declining, dropping eight percent or 1,307 students last year, while the number of African research scholars grew by an impressive 13 percent to 1,888 from 44 countries.

REGIONAL OVERVIEW

EducationUSA in Africa is guided by a multifaceted mission to open higher education opportunities to African students with an emphasis on preparation for U.S. study, access to financial assistance where needed, building African universities through faculty development, and building African societies through principles of good governance and management and access to technology.



Fast-growing, emerging economies are accelerating entrepreneurship, income generation, and school enrollments. As Anya Kamenets of FastCompany.com points out, “Africa has the world’s largest unmet demand for higher education. There are 200 million people aged 15 to 24, the youngest population in the world. This youth population is on track to double by 2045.”

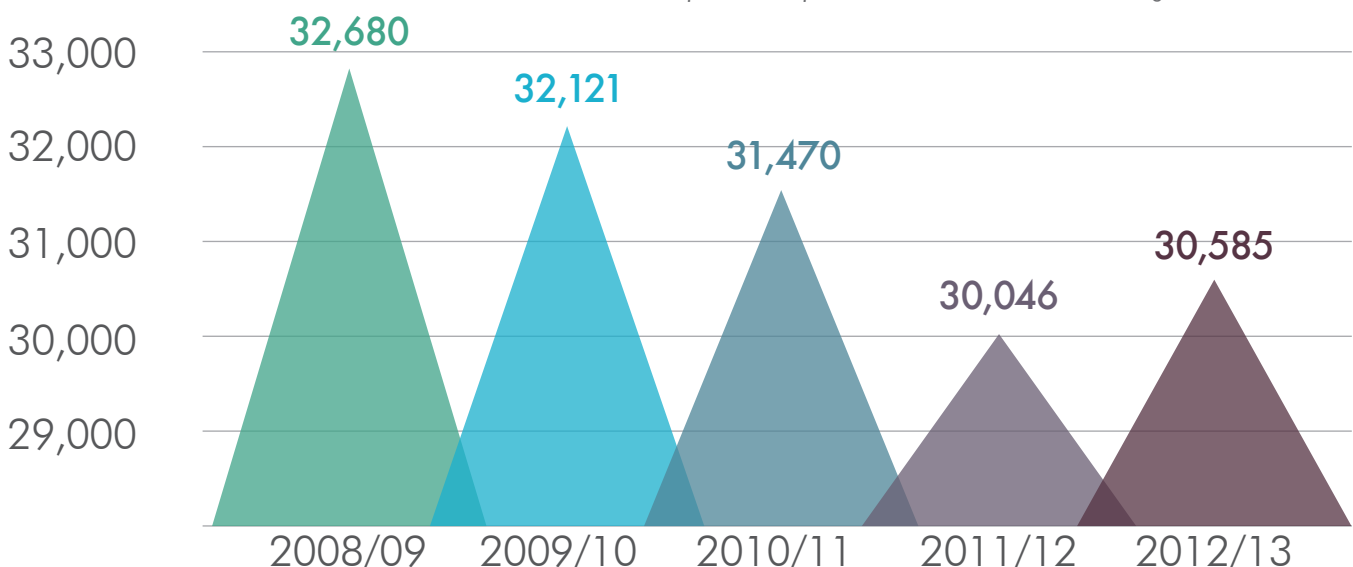
Throughout Sub-Saharan Africa, there has been a gradual expansion of English language study at all levels, shifts in academic calendars to the September-May semester model, adoption of grading systems, credit hours, and GPAs, and online information about educational systems and their credentials—all developments that are setting the pace for the next decade. Ambitious students are teaching themselves online and on their phones.

Africa’s latest higher education initiatives include the World Bank’s African Centers of Excellence in partnerships with U.S. universities; the \$500 million global initiative by the MasterCard Foundation Scholars Program to educate the next generation of African leaders; the \$10 million Bloomberg Media Initiative in Kenya, South Africa, and Nigeria; IBM’s research center in Nairobi; Stanford’s West African SEED (Stanford Institute for Innovation in Developing Countries) in Accra; and a thriving American University in northeastern Nigeria.

The Pan African University (PAU) is a continental academic network of higher education institutions of excellence for graduate studies and advanced research.

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.



A flagship project of the African Union Commission, the institution is organized under five thematic areas and hosted in existing universities in African Union member states: PAU Institute of Life and Earth Sciences (including agriculture and health) at the University of Ibadan in Nigeria; PAU Institute of Basic Sciences, Technology, and Innovation at the Jomo Kenyatta University of Agriculture and Technology in Kenya; PAU Institute of Governance, Humanities, and Social Sciences at the University of Yaoundé II in Cameroon; PAU Institute of Water and Energy Sciences (including climate change) at the Université Abou Bekr Belkaid Tlemcen in Algeria; and PAU Institute of Space Sciences to be hosted by a southern African country to be identified.

Mauritius is setting up an education hub with a projected capacity of 15,000 students, 80 percent of them international. The island is ideally situated to attract students from all parts of Africa and Asia and offers an extremely appealing living environment at reasonable cost.

Kenya has officially upgraded 15 university colleges to full university status, bringing the number of public universities to 22 and expanding enrollment to 240,000. Although this expansion awaits full funding, it gives students more viable choices and expands the pool of potential graduate students.

Africans are also exploring new models for learning that take advantage of emerging technologies. Microsoft's 4Afrika Initiative engages 10,000 Africans in networked technologies, and its University of the People helps motivated students overcome barriers to free learning.

Facebook founder and CEO Mark Zuckerberg announced a partnership with the Massive Open Online Course (MOOC) provider edX to offer free courses in Rwanda. Students in EducationUSA centers are participating in growing numbers in State Department-hosted online classes and discussion groups using Coursera's MOOC platform.

Inspired every day by student determination and drive, EducationUSA Regional Educational Advising Coordinators (REACs) and advisers are ever-optimistic about Africa's prospects. Students enrolling in EducationUSA cohort programs are learning critical thinking, decision making, writing, and reading skills that will carry them through their university education and beyond.

U.S. higher education's investment in Africa by recruiting more African students to study in the United States and partnering with African universities will pay off for decades to come.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	%Change from 2011/12
Nigeria	7,316	4.1%
Kenya	3,516	-9.8%
Ghana	2,863	3.4%
South Africa	1,816	12.8%
Cameroon	1,472	-3.8%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
Equatorial Guinea	94	196	108.5%
Congo, Dem. Rep. of/Zaire	247	386	56.3%
Rwanda	366	565	54.4%
Angola	544	812	49.3%
Congo, Republic of the	208	309	48.6%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

108.5%

Equatorial Guinea has the largest percentage growth in the region over the last five years (with over 100 students)

RECENT TRENDS

- As reported in the *Financial Times* on October 7, 2013, the World Bank has raised its economic outlook for Sub-Saharan Africa for 2014, saying that strong domestic demand coupled with higher production of commodities will lift the region's growth above five percent. "As in recent years, a number of African countries will continue to be among the fastest growing countries in the world," according to the Bank, which named Ethiopia, Mozambique, Niger, Sierra Leone, and Rwanda as top performers.
- African countries continue to struggle with public demand for better education, resulting in university strikes in several countries, the most publicized being Nigeria's six-month hiatus in 2013. The silver lining to this instability is students' and parents' decision to turn to international options for higher education.
- EducationUSA advisers in most African countries report rising interest in graduate study. A graduate degree from the United States is considered a stepping stone to professional success. Advisers are developing new programs to help students become competitive and welcome increased collaboration with graduate admissions offices in the United States.
- Africa offers U.S. institutions a way to diversify and deepen their internationalization, bringing fresh perspectives to classroom discussion.
- Interest in English learning continues to grow. Advisers encourage students to learn English and take English proficiency tests at home before applying to universities in the United States so they are better prepared to enter degree programs directly.

COUNTRIES IN THE SPOTLIGHT

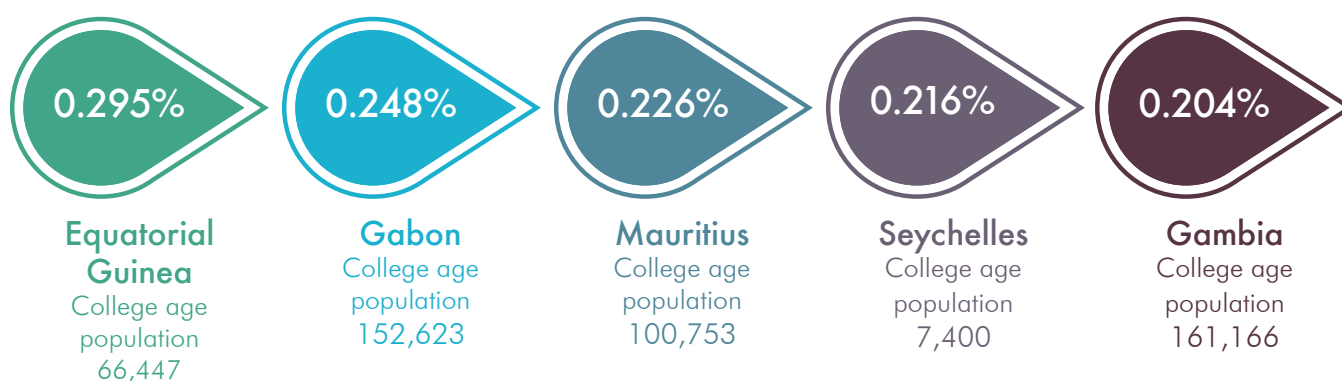
Nigeria, Kenya, Ghana, South Africa, Cameroon, Ethiopia, and Zimbabwe have the highest U.S. enrollments with more than 1,000 students each year in the United States. Countries with more than 60 percent increases in U.S. enrollment in the last five years are Rwanda, Congo-Brazzaville, Equatorial Guinea, Cabo Verde, and Angola.

Angola, Burundi, Congo Brazzaville, Côte d'Ivoire, Equatorial Guinea, Rwanda, and Swaziland were among the countries setting record-high enrollments in the United States in the past year, which makes them exciting markets for recruitment off the beaten path and worth exploring.

Top senders of intensive English students to the United States are Angola, Côte d'Ivoire, Equatorial Guinea, Congo-Brazzaville, and Senegal, although, anecdotally, students who are able to show strong academic records and goals and good-faith efforts to learn English at home are often better placed when applying for their U.S. visas.

Countries with more than 40 percent of their undergraduates enrolled in U.S. community colleges are Equatorial Guinea, Gabon, DR Congo, Angola, Gambia, Madagascar, Mali, Malawi, Burkina Faso, Eritrea, Benin, Guinea, Congo-Brazzaville, Sudan, and Cameroon (countries with fewer than 100 students in the United States are not included). Note that Francophone and Lusophone countries predominate. In the region as a whole, 28 percent of undergraduates are attending community colleges.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

Countries with more than 35 percent of their students enrolled in graduate study are Eritrea, Ghana, Uganda, Comoros, Malawi, Sudan, Mozambique, Madagascar, Liberia, and Nigeria. Countries with more than 100 students taking the GRE or GMAT: Nigeria 4,345; Ghana 1,712; Kenya 1,347; South Africa 1,106; Cameroon 535; Ethiopia 404; Zimbabwe 320; Uganda 293; Cote d'Ivoire 210; Tanzania 189; Rwanda 188; Sudan 137; Senegal 125; Eritrea 113; and Burkina Faso 122.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Africa faces a huge increase in the number of high school graduates seeking admission to local higher education institutions that lack capacity in terms of facilities, instruction, and funding. In Ghana, Kenya, Malawi, and several Francophone countries, double the current number of students will vie for university entrance because of structural changes to the university system, long strikes or political disruptions that resulted in a lost academic year. These developments represent a recruiting opportunity for U.S. colleges and universities.
- EducationUSA advising centers have rapidly increased their capacity to guide students through competitive admissions processes, resulting in more well-qualified African students applying to study in the United States.

- The much-heralded MasterCard Foundation Scholars Program is helping disadvantaged African students to recognize that study in the United States is now impossible, and these students are flocking to EducationUSA advising centers.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

Angola, Botswana, Equatorial Guinea, Ghana, Mauritius, Nigeria, and Rwanda offer government scholarships on a limited scale. Most scholarships in Angola, Equatorial Guinea, Ghana, and Nigeria are tied to the oil industry. The Rwanda Presidential Scholars program works with a group of 19 U.S. institutions. The Mauritius scholarship program benefits top-ranking students in the national exams. Contact EducationUSA advisers for details.

VIRTUAL AND SOCIAL MEDIA USAGE

- Students in every African country report that Facebook is the first place they go when they are online. Almost all EducationUSA advising centers in the region have Facebook pages or groups. U.S. institutions are welcome to join our EducationUSA Africa closed Facebook group where African higher education news and student success stories are posted.

In calendar year 2013, EducationUSA in Sub-Saharan Africa made 964,527 contacts.



345,671 contacts made through advising centers		582,730 contacts made through outreach activities		36,126 contacts made through virtual platforms*	
Advising Center-based Contacts	345,113	Education Fairs	52,091	Social Media Platforms	35,506
U.S. Institution Representative Visits	558	American Corners / Centers	20,682	Webinars / DVCs	620
		Local Universities / Secondary Schools	84,546		
		Other Fairs / Conferences / Seminars	407,029		
		Host Government Events	4,538		
		Embassy / Consulate Events	914		
		Public Locations	6,871		
		Other Activities	6,059		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

- Skype works well in most countries and is easy to use for everything from large group orientations to individual admissions interviews. Our advisers have found that it is especially effective to set up discussions between students on a U.S. campus from a particular country and an EducationUSA advising center, as this rapidly increases applications.
- EducationUSA is beginning to use Watchitoo, a promising platform that adapts to bandwidth limitations. Google hangouts also work well.
- Four out of five Africans use SMS messaging; lower-cost feature and smart phones now being introduced will accelerate the switch to more advanced technology. A mobile outreach strategy should include SMS and feature phones to reach prospective students.
- Recruit through EducationUSA, as African students and parents are often suspicious of local commercial agencies.
- Join the EducationUSA Africa Facebook group where African higher education news and student success stories are posted.
- Set up digital video conferences or Skype discussions between students from a particular country or subregion on your campus and an EducationUSA advising center, as this rapidly increases applications. Whether you're reaching out to STEM graduates who seek help in writing personal statements or to English language students from Francophone and Lusophone countries, online discussions reach students.

SUCCESSFUL RECRUITING STRATEGIES

For admissions visitors and fair-goers: traveling with larger group tours works well for a first visit to the region after which many admissions representatives prefer to travel in smaller groups for customized impact. EducationUSA advisers can help U.S. institutions determine the best time to visit, learn about local customs and best approaches, and set up schedules that will maximize the quality and quantity of students met.

Recruiting strategies that work:

- Offer scholarships and financial aid. An effective way of enabling African students to enroll at your institution is to combine smaller scholarships into full awards. Email messages to Africa's REACs and postings to EdUSA Africa's Facebook group will get out the word.
- Avoid broad assumptions about finances. Although EducationUSA students were awarded over \$25.5 million in financial assistance in 2013, African families spent as much as \$800 million on U.S. study.
- When in doubt about academic and financial documents, consult the EducationUSA advisers in the countries concerned.
- Focus on institutional partnerships, sister-city agreements, alumni networks, historical ties, and research connections.
- Explain fees and financial aid in detail and provide alternatives to credit card payments whenever possible because many African students either don't have or cannot use credit cards.
- Recruit through alumni who have returned to their home countries and study abroad students in-country.

REGIONAL EDUCATIONUSA EVENTS

Every year, representatives from more than 100 institutions meet African students in person at EducationUSA centers. EducationUSA advisers arrange visits, including scheduling fairs and school/university visits, hotels and local transport, and briefings on local educational systems.

In October 2013, The MBA Tour came to Africa for the first time, drawing an audience of more than a thousand prospective MBAs in four countries, a resounding success that will be repeated in 2014.

The EducationUSA site announces country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA advising centers are planning local events during the year and gearing up for our long-awaited Africa Regional Forum in 2015.



FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, and visit local high schools and universities. Contact EducationUSA advisers to explore options for maximizing the impact of your participation.

CENTER EVENTS

Stay connected to the EducationUSA Africa closed group on Facebook and check center pages on the EducationUSA website for the latest announcements of special programs at our advising centers. Contact advisers if you are interested in setting up programs online.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

EducationUSA advisers will work with you to make your visit a success. EducationUSA recommends visiting during the following months:

West Africa:	June to mid-July, October–November, January–March
Southern Africa:	February–May, July–August
East Africa:	March–June, October–November
Sudan:	January–April
Malawi:	May–August
Zimbabwe:	May–July, September

The least productive times to connect are during Ramadan, Easter, Christmas, and exam periods: April–June and November–December.

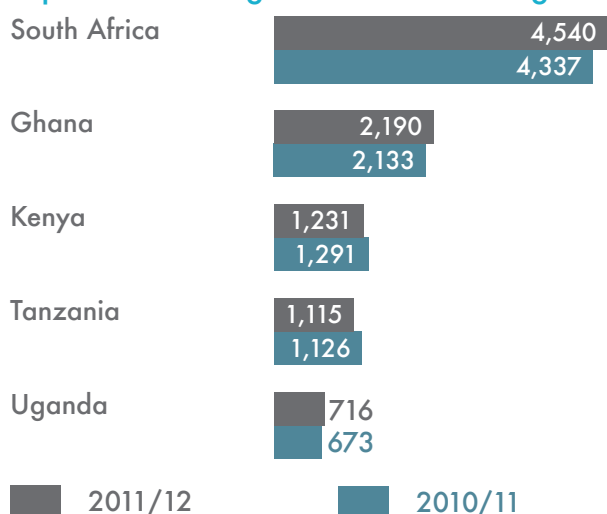
U.S. STUDY ABROAD IN THE REGION

Africa is an increasingly popular destination for U.S. students. In 2011–2012, 12,859 U.S. students chose Africa for study abroad, an eight percent increase from the previous year. EducationUSA advisers can help facilitate study abroad programs, and we welcome U.S. student interns in our centers. The top five study abroad

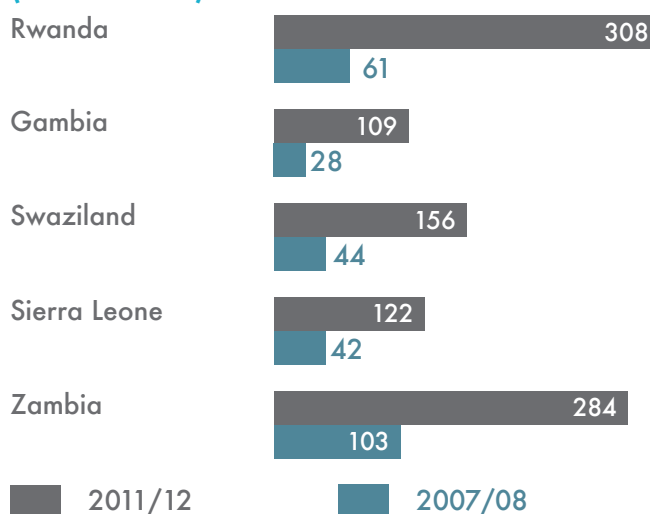
destinations in Africa for Americans in 2011–2012 were South Africa, Ghana, Kenya, Tanzania and Uganda. Destinations that had the highest percentage increase in the numbers of American students were: Gambia, Ethiopia, Madagascar, Rwanda, and Namibia—all of which hosted more than 100 students in 2011–2012.

Note: Unless otherwise cited, all student mobility statistics come from the *2013 Open Doors Report on International Educational Exchange*, produced by the Institute of International Education (IIE) and sponsored by the U.S. Department of State.

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*, 2009–2013.

EAST ASIA AND PACIFIC

Australia, Brunei, Burma, Cambodia, China, Federated States of Fiji, Hong Kong and Macau, Indonesia, Japan, Laos, Malaysia, Marshall Islands, Micronesia, Mongolia, New Zealand, Palau, Papua New Guinea, Philippines, Singapore, South Korea, Taiwan, Thailand, Timor-Leste, Tonga, Vietnam

30 EducationUSA Advising Centers in the Region:

12	Comprehensive Standard Reference
6	
12	

REGIONAL EDUCATIONUSA PROFILE

EducationUSA advising centers in East Asia and Pacific (EAP) are as varied as this geographic region. As the trusted source of information on studying in the United States, EducationUSA advising centers are located in embassies, consulates, Fulbright Commissions, and American Spaces in many countries and partner with local universities, libraries, and NGOs in others. Regional Educational Advising Coordinators (REACs) and advisers act as guides to understanding the region's vast education landscapes.

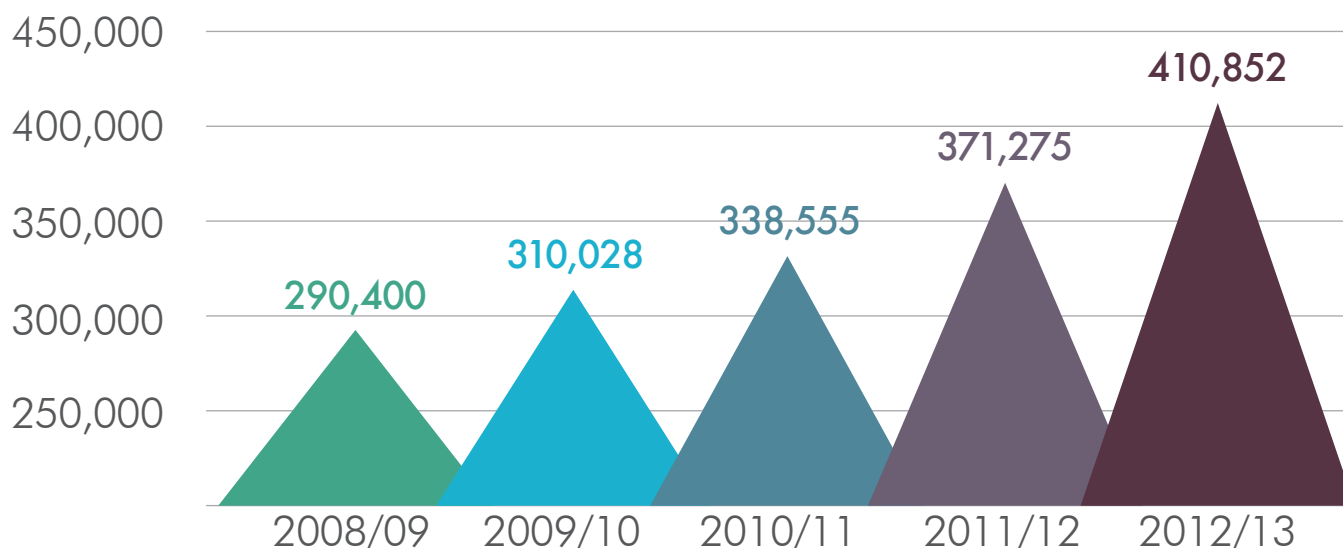
Integral to the region is the robust online advising that takes place through social media, purpose-built websites, and SMS. Advising centers in China, Indonesia, and

Japan rely heavily on technology to reach students while more personalized attention is common in Australia, Malaysia, and Taiwan. In some parts of the region, EducationUSA works with local and national media to reach a broader audience through news articles, advertisements, and general information about higher education opportunities in the United States.

EducationUSA centers stress the American cultural value of "Do It Yourself" to students, e.g., choose your school, write your own application, sit for tests, solicit letters of reference, and submit authentic transcripts. EducationUSA centers in EAP provide the tools, resources, and guidance that students and their parents need to feel confident in embracing academic integrity, which will prepare them well for their years ahead.

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.





REGIONAL OVERVIEW

Spanning the largest geographic area, East Asia and Pacific ranges from the mountains of Mongolia and the mega-cities of China to the temples and jungles of Laos and Vietnam to the sandy beaches of Samoa and Australia. It encompasses a wide range of religions, languages, and countries and includes many of the top places of origin for international students in the United States.

With a total sending population of 410,852 students, the region accounts for 50 percent of all international students in the United States and the numbers are growing. While the global number of international students studying in the United States increased by seven percent from 2012 to 2013, the EAP region boasted an 11 percent growth rate.

RECENT TRENDS

- Over the past five years, the region averaged more than seven percent annual growth in student numbers to the United States. This growth is expected to continue, thanks to positive economic indicators and ongoing interest in international education. However, as competition increases and destinations in East Asia and Pacific continue to vie for market share over traditional destinations, U.S. institutions have both a challenge and an opportunity to meet the growing demand for quality higher education for the region's quickly expanding middle class.
- The U.S. and Japanese governments partnered to increase student mobility between the two countries.
- This renewed collaborative effort comes in response to the continued decline in Japanese student numbers in the United States, largely due to a dramatic drop in population, coupled with a high capacity to meet educational demands at domestic institutions in Japan. From 2011-2012 to 2012-2013, the number of Japanese students studying abroad declined by two percent.
- The number of Australian students traveling to the United States increased seven percent over the past year and a strong Australian dollar will help support continued student mobility. Australia is also the top destination for Southeast Asian students studying abroad, making it a rich recruiting environment for third-country students—particularly for graduate studies.
- In China, two major factors sustain Chinese interest in pursuing higher education in the United States. First, because of the intense competition of the *Gao Kao* (National College Entrance Examination), more families are turning to overseas universities as a viable and less stressful option for their children. Second, Chinese students continue to show interest in living abroad, and the United States remains the most popular destination. As a result, China was the top place of origin of international students in the United States in 2012-2013 for the fourth year in a row. Close to 236,000 students studied in the United States in 2012-2013, reflecting a 21 percent increase from the previous year.
- In terms of macro trends impacting student mobility in Southeast Asia, significant foreign commercial

interest has heightened in the mainland of the region: Burma, Cambodia, Laos, Thailand, and Vietnam. Current and projected economic growth tied to natural resource development and increasingly favorable trade and investment policies contributed to this increase in interest in U.S. study. Rapid GDP growth and resulting middle-class expansion are key indicators for the international student market in the region.

- Over the past five years, the Southeast Asia sub-region averaged 3.5 percent annual growth in students studying in the United States. The current regional total of 47,152 represents a 25 percent market share of the total number of students who leave their home countries for higher education (UNESCO). The United States is the second most popular destination behind Australia.
- Southeast Asia demonstrated notable growth in undergraduate student enrollment in U.S. institutions this past year. Burma recorded the highest growth rate of 25 percent, Indonesia grew by 10 percent, and Cambodia grew by 36 percent. Community college enrollments constitute more than 20 percent of all Southeast Asian students enrolled in the United States.

COUNTRIES IN THE SPOTLIGHT

South Korea: South Korean student numbers increased by nearly two percent, and the country ranks as the third largest sending country with 73,351 U.S. enrollments. Enrollments are driven by strong ties to the United States and demand for English proficiency during a time of rapid economic development. U.S. higher education offers attractive academic programs that support South Korea's thriving semiconductor, telecommunications, and automotive export industries. For these fields, students seek programs in business, English, engineering, law, and computer science.

Hong Kong: The number of available undergraduate seats in Hong Kong universities is fewer than the number of students who can fulfill the entry requirements, making undergraduate admissions highly competitive. Only 20 percent of high school graduates can enter public universities. The remaining 80 percent of graduates either study overseas or opt for alternative local study options. With an increased demand for a highly skilled and knowledgeable workforce in a wide array of fields, many students in Hong Kong choose to pursue graduate degrees.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	% Change from 2011/12
China, People's Rep. of	235,597	21.4%
South Korea	70,627	-2.3%
Taiwan	21,867	-5.9%
Japan	19,568	-2.0%
Vietnam	16,098	3.3%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
China, People's Rep. of	98,235	235,597	139.8%
Myanmar/Burma	667	955	43.2%
Australia	3,203	4,121	28.7%
Vietnam	12,823	16,098	25.5%
New Zealand	1,074	1,311	22.1%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

139.8%

The People's Republic of China has the largest percentage growth in the region over the last five years (with over 100 students)

Mongolia: The Mongolian government is placing more emphasis on the funding of undergraduate and graduate studies in the United States. Mongolian students at both levels may apply for a scholarship or loan to study at a U.S. university. According to IIE's *Open Doors* report, 1,361 Mongolian students studied in the United States in 2012-2013. Of this total, 64 percent studied at the undergraduate level, 18 percent studied at the graduate level, and 18 percent were enrolled in OPT or non-degree programs.

Taiwan: The United States continues to be the top study-abroad destination for students from Taiwan, and Taiwan now ranks as the sixth largest source of international students in the United States with 21,867 students in the last academic year. In 2012-2013, approximately 50 percent of students from Taiwan who studied in the United States pursued graduate studies, 27 percent undergraduate studies, and another 23 percent OPT or non-degree programs. The top three fields of study for Taiwan students are business, engineering, and design. A very high percentage of faculty members at Taiwan's universities have received PhDs in the United States. Among Taiwan's 45 cabinet members, 25 studied in the United States.

Burma: Historically overlooked in the past, Burma is now in the spotlight of U.S. university engagement. EducationUSA's annual university fair in Yangon in early 2014 drew a record 37 U.S. institutions. Over the past five years, Burma has experienced 10 percent annual growth in the number of students studying in the United States with expectations of this trend continuing.

Indonesia: 2013 marked the highest uptick in the number of students studying in the United States in more than ten years. The country continues to exhibit

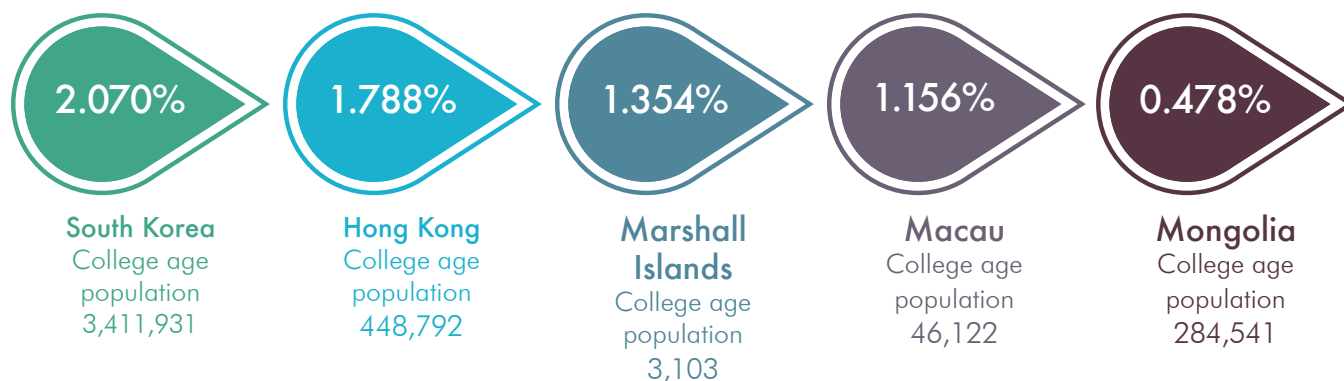
high growth potential for U.S. recruiters with the largest regional economy, the world's fourth largest population, a sizable middle-class citizenry, and a strong network of rigorous schools.

Vietnam: The country has posted historic growth with a greater than 400 percent increase in student mobility since 2003. In addition to being the world's eighth largest sender of students to the United States, Vietnam is also the world's third largest source of international students at U.S. community colleges. These numbers are expected to grow along with the rapidly expanding economy and the increased demand for education by a population consisting of 45 percent youth under the age of 25.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Australia and the United Kingdom will continue to be top competitors for the United States while regional competition for students will increase most notably from China, Japan, Malaysia, and Singapore.
- While the number of Asian regional education hubs will grow significantly over the next five to ten years, both the rate of adoption and capacity for engagement in international education are not likely to be as high as local governments predict.
- More institutional partnerships or joint degree programs will be set up in the region, offering students an option to earn a U.S.-style degree without leaving their home country. In some parts of the region, these relationships are activity incentivized through local providers and governments.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

- Tokyo will host the Olympics in 2020, and the planning committee will need the help of ESL programs to train the private sector, giving opportunities for U.S. providers to establish English programs in Tokyo.
- Traditionally a source for enrollments from Australia and New Zealand, the Pacific is likely to become more of a focal point for international student recruitment in the United States, given new opportunities for economic trade and links generated by U.S. foreign assistance.
- Papua New Guinea is fast becoming an accessible market for graduate students in areas related to sustainability and oil and gas.
- EAP is a prime market for community colleges. Many students in the region are unable to afford tuition at a four-year institution, so promoting 2+2 programs is a natural fit. Short-term programs will continue to be in higher demand than four-year degrees. South Korea is the largest sender of international students to community colleges in the world and Vietnam is the third largest.
- The Mongolian economy is growing fast, as is the level of English language proficiency among students. The number of Mongolian students financially able and academically prepared to study in the United States will increase in coming years as more qualified students graduate from high schools with sufficient knowledge of English and other general subjects. The Mongolian government provides financial support for engineering, technology, natural sciences, and environmental sciences. Education, business, and agricultural are also popular fields of study.
- ASEAN Economic Integration in 2015 will enhance the Southeast Asia international student recruitment market by facilitating greater English proficiency and regional purchasing power through the expansion of the middle class.
- Competition from regional education hubs in Australia, China, Malaysia, and Singapore will coincide with a diversification of low-cost offshore degree offerings, e.g. English-medium degree programs offered by Chinese universities in Thailand.
- The number of Cambodian students studying in the United States will double from the 300-400 range to the 600-700 range over the next five years. In addition to a favorable economic climate, national English language improvement and an increase in high quality private international high schools factor into this trend.
- Foreign investment in Burma will spur economic growth in the middle class along with a related interest in professional and vocational training programs in business and manufacturing. An increasing number of students will look for graduate programs in the areas of public health, social work, urbanization, public policy, and business management.

In calendar year 2013, EducationUSA in East Asia and Pacific made 1,211,069 contacts.



113,951 contacts made through advising centers		130,251 contacts made through outreach activities		942,216 contacts made through virtual platforms*	
Advising Center-based Contacts	113,089	Education Fairs	49,097	Social Media Platforms	940,981
U.S. Institution Representative Visits	862	American Corners / Centers	9,222	Webinars / DVCs	1,235
		Local Universities / Secondary Schools	57,068		
		Other Fairs / Conferences / Seminars	19,111		
		Host Government Events	5,644		
		Embassy / Consulate Events	1,878		
		Public Locations	8,199		
		Other Activities	4,683		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **South Korea:** The Korean Student Aid Foundation offers up to \$50,000 for talented students in the sciences for both international and domestic study. Fulbright scholarships and grants are available in a number of fields, including up to \$40,000 for highly qualified masters- or doctorate-seeking students. The Korean government, private companies, and organizations also offer generous scholarships.
- **Japan:** The Ministry of Education (MEXT) has set a goal to send 120,000 Japanese university students and 60,000 Japanese high school students abroad by 2020. These objectives are in line with the goals and recommendations of the CULCON Education Task Force. To lessen the financial burden on university students who are willing to study abroad, MEXT plans to provide additional scholarships for short-term and long-term study abroad in 2014. MEXT is also creating a public-private partnership scholarship fund in 2014 with funds from private company donors. In addition, MEXT plans to bolster Japan's educational system by increasing the number of International Baccalaureate (IB) schools, as well as supporting the development of "Super Global Universities" with a focus on research that will seek additional partnerships with universities abroad. The point of contact for each university is available on the Japan Society for the Promotion of Science (JSPS) website.
- **Australia:** Endeavour Research Fellowships provide financial support for Australian postgraduate and postdoctoral students for short-term research in the Asia-Pacific region, the Americas (including the United States), Europe, and the Middle East.
- **Hong Kong:** The Sir Edward Youde Memorial Fellowships finance outstanding Hong Kong students for postgraduate studies (<http://ow.ly/uLmmn>).
- **China:** The China Scholarship Council provides financial assistance to both Chinese students studying overseas and foreign students who wish to study in China (<http://ow.ly/uLmqM>).
- **Mongolia:** The Mongolian Ministry of Education and Science (MES) offers scholarships for undergraduate students who participate successfully in the International Olympiads in environmental sciences, physics, mathematics, and chemistry. Students may also request funding for undergraduate studies at the world's top 100 colleges and universities, as enumerated by the *Times Higher Education Supplement* and Shanghai ranking. MES offers government loans for undergraduate students who are studying in their sophomore and junior years at U.S. schools. For graduate students, MES also offers government loans if a student is admitted to one of the world's top 500 schools (*Times Higher Education* supplement and Shanghai ranking), including colleges and universities in Australia, Japan, the United Kingdom, and the United States.
- **Taiwan:** Taiwan's Ministry of Education and foreign government institutions provide government study abroad scholarships for master's and PhD degree-seeking students (<http://ow.ly/uLmxX>). The Taipei city government offers loans for students who are studying in accredited master's, PhD, and professional certificate programs (<http://ow.ly/uLmCH>).
- **Vietnam:** Government-sponsored training of university faculty and government officials has two sources:
 - o Project 165 (<http://ow.ly/uLmKJ>) sponsors 1,500 government officials at overseas universities for graduate level training through 2015.
 - o Project 911 (<http://ow.ly/uLn9m>) sponsors 10,000 university faculty for doctoral study at overseas universities through 2020.
- **Malaysia:** The Public Service Department of Malaysia offers scholarships for both undergraduate and graduate study abroad with a focus on the critical fields of medicine, dentistry, pharmacy, veterinary medicine, engineering, and science and technology (<http://ow.ly/uLnmb>). PETRONAS offers a comprehensive list of scholarships (<http://ow.ly/uLnq1>).
- **Indonesia:** The Ministry of National Education (DIKTI) awards approximately 1,000 scholarships per year for graduate study by university faculty (<http://ow.ly/uLnx5>). The Ministry of Trade (<http://ow.ly/uLnBr>) awarded 21 U.S. scholarships in 2013 while the Papua Provincial Government (<http://ow.ly/uLnKL>) launched their "1000 PhDs" initiative. The Ministry of Foreign Affairs (<http://ow.ly/uMT2m>), the Ministry of Communication & Informatics (<http://ow.ly/uMT3r>), and the National Development Planning Agency (<http://ow.ly/uMT5Q>) also offer graduate scholarships.
- **Burma:** The Government of Burma currently provides no financial aid or scholarships for students to study abroad. Most students rely on a mix of family support, significant financial aid provided by colleges/

universities, and private scholarships. Below is a partial list of organizations providing scholarships for Burmese students:

- o Supplementary Grant Program Asia (SGPA) – Open Society Foundation (<http://ow.ly/uMT4G>)
- o Cetana Educational Foundation (<http://ow.ly/uMT7X>)
- o Prospect Burma (<http://ow.ly/uMZMj>)

VIRTUAL AND SOCIAL MEDIA USAGE

- Japan and South Korea: Popular platforms in Japan include Mixi, Mobage-town, Gree, LINE, Facebook, and Twitter. Popular platforms in Korea include Facebook, Twitter, LinkedIn, and local platforms Naver and Daum. Students access the vast majority of social networks via smartphone applications and mobile technology. South Korea is a world leader in embracing the latest high-speed mobile technology.
- Australia, New Zealand, and the Pacific Islands: Facebook and Twitter users dominate these markets. However, Bebo remains a popular social networking site. Internet usage across the Pacific Island nations remains relatively low. Fiji and Micronesia lead in total market penetration at just under 15 percent while islands such as Papua New Guinea, the Marshall Islands, Tonga, and Kiribati hover around 5 percent. In Australia and New Zealand, 3G penetration is now at 58 percent and 44 percent, respectively. Social networking via the internet is still common, although smartphone and mobile technology is emerging.
- China: According to a China National Network Information Center report, there were 591 million internet users in China at the end of June 2013, and 464 million of them (78 percent) accessed the internet through cell phones. There is significant growth in smartphone ownership, especially in rural areas. While microblog numbers have dropped, there is continued growth in instant messaging apps, especially WeChat.
- Hong Kong: Hong Kong's fixed broadband penetration rate is among the highest in the world with more than five million online users (more than 75 percent of the population), according to Internet World Stats and Digital Jungle. The most influential social networking site in Hong Kong is Facebook. YouTube and Whatsapp are also popular among young netizens for entertainment purposes. Unlike the United States, there are not many Skype and Twitter users. Young people in Hong Kong tend to use social media channels primarily to keep in touch with friends.
- Therefore, personalized attention is still needed to reach students.
- Mongolia: Most young people use all types of social media (websites, Facebook, Twitter, MSN). Facebook is very popular and is the main social media tool for EducationUSA advising activities in Mongolia. Wireless technologies have had great success and mobile phones are becoming increasingly common, even in rural areas. Internet usage has grown rapidly in the last few years and dial-up, wireless, 3G or internet modems are commonly used with smartphones or notebooks. Especially in the countryside, the government prefers installing cell phone stations over laying land lines.
- Taiwan: Taiwan people are tech savvy with internet penetration at 75 percent. According to a report, approximately 70 percent of cell phone buyers purchase smartphones. Social media and internet technology are crucial tools for attracting students. The number of active Facebook users in Taiwan surpasses 14 million per month, or about a 60 percent penetration, and the number of daily users has hit 10 million.
- Southeast Asia: The most effective medium of communication in the region continues to be email with social media gaining prominence. Sites such as Facebook and Twitter are commonly used, but accessing the internet via mobile phone is more prevalent than using a traditional computer. As such, mobile-ready website content is key when developing a social media strategy for the region and may be a better investment than tablet or mobile phone apps. There is increased participation in webinars and virtual college fairs, although virtual advising/counseling presents a challenge in an environment where decision making is family-centered and parents expect personal/in-person advising.
- Burma: Internet penetration is low in Burma with less than one percent participation, making it one of the largest untapped markets in the world. Users are mostly young people in Yangon, Mandalay, and other major cities with relatively better online access. Facebook and YouTube are the most popular social media sites, and the Embassy, Rangoon American Center, and EducationUSA regularly use Facebook to promote programs.
- Cambodia: The number of internet users in Cambodia is 2.7 million, or 18 percent of the population. Internet penetration increased 548 percent in 2012 alone. As online engagement increases, Facebook and YouTube use are blossoming among youth.

SUCCESSFUL RECRUITING STRATEGIES

- Create recruitment strategies with both students and parents in mind. Local language information can help reach parents. Develop attractive and easy-to-navigate mobile-ready websites with a link for international students. Invest in physical presence to build trust and name recognition.
- Establish and use partnerships. Develop agreements with community colleges to facilitate transfer students and highlight the cost-saving dimensions of such arrangements. Consider joint marketing with other like-minded U.S. institutions.
- Connect your alumni living in the region with the nearest EducationUSA advising center and capitalize on opportunities for them to represent your institution.
- Focus on the familiar, e.g., sister-city agreements and immigrant ties. Students in EAP often look to success stories from their peers for added guidance during the decision-making process, so alumni are an excellent way to connect with advising centers and students across the region.
- Develop financial aid programs, proven tools for recruitment that can also be useful for longer-term institutional brand building. Publicize these possibilities, including research or teaching assistantships.
- Target second cities that can be more productive for recruitment compared to the demands of brand-conscious residents in capitols and other major cities. Think in terms of a strategic long-term vision (e.g., three years) and target locations/areas to make an investment that will yield returns in the future.
- Seek niche markets that are often forgotten, such as sports, LGBT, HBCUs (popular in the Pacific Islands), or women's colleges.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

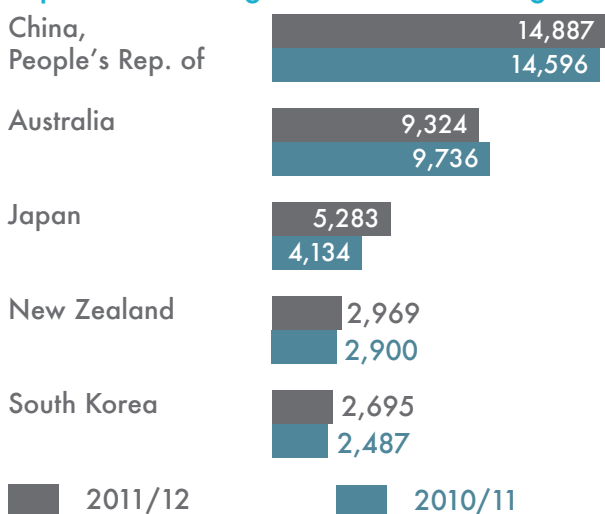
FAIRS AND CONFERENCES

- In addition to the many in-person student recruitment opportunities offered through EducationUSA fairs

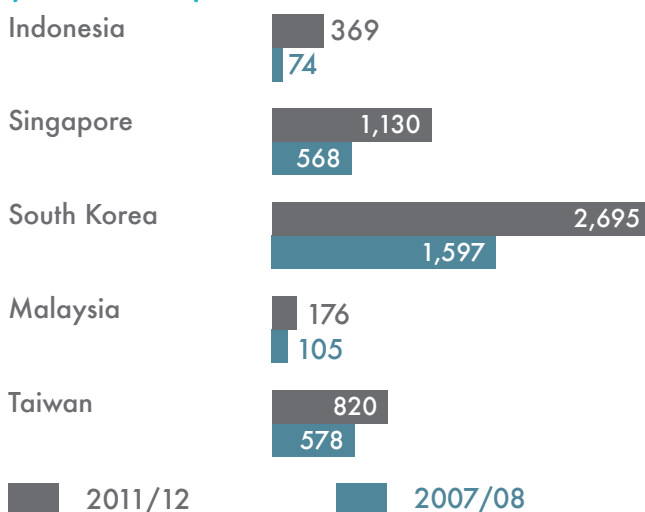
and conferences, representatives of U.S. institutions can capitalize on these events with a country briefing from EducationUSA advisers, a meeting with U.S. embassy public affairs and consular staff (subject to scheduling availability), a presentation at an EducationUSA Advising Center, or a visit to a local high school or college. HEI recruiters should contact the EducationUSA staff organizing these events to explore options for maximizing the impact of their participation.

- **The EducationUSA Pavilion at the Asia-Pacific Association for International Education (APAIE):** Join the annual APAIE conference for an opportunity

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

to create and develop partnerships between U.S. universities and institutions in the EAP region. EducationUSA hosts a pavilion at the event to assist in facilitating U.S. institutions with meeting East Asian and Pacific higher education institutions.

- **Southeast Asia College Fair Series:** Details of the 2015 spring tour will be announced soon. For more information, visit www.EducationUSA.state.gov.

CENTER EVENTS

Check with individual centers to find out about their activities. Attract students from all of EAP by participating in Adobe Connects and Watchitoo info sessions. Contact a REAC in the region to coordinate.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

As a general rule for EAP, March to May and August to November are the best times to engage with students. However, please check with the local advising center to see whether there are exams or holidays before planning your visit.

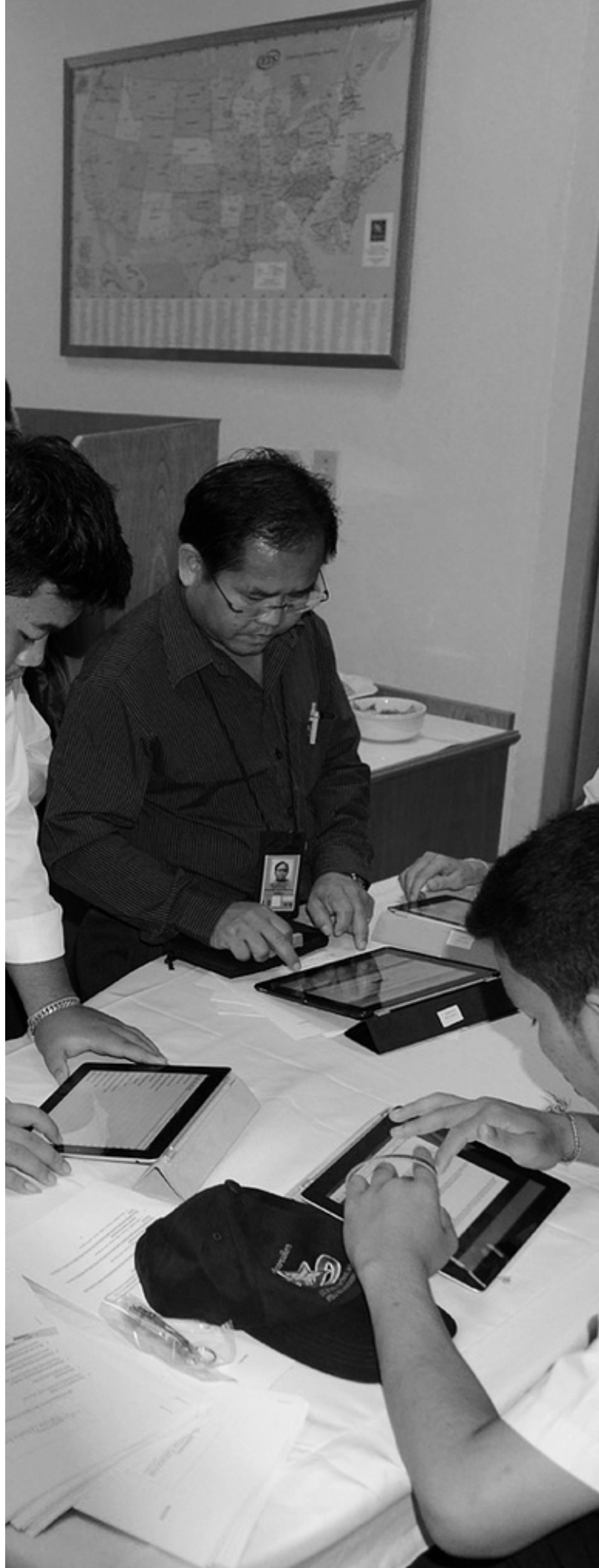
The Lunar New Year, usually in January or February, impacts most of the region and many businesses and schools are closed during this time.

U.S. STUDY ABROAD IN THE REGION

Southeast Asia: Southeast Asia saw a 14 percent increase in the number of U.S. students participating in study abroad programs. Six countries hosted more than 300 students in 2011-2012, and Singapore, Thailand, and Vietnam each hosted more than 900 students.

China: EducationUSA China supports President Obama's 100,000 Strong Initiative, a national effort designed to dramatically increase the number and diversify the composition of U.S. students studying in China (<http://ow.ly/uMT9U>). In 2011-2012, 14,887 U.S. students participated in credit-bearing programs in China.

Note: Unless otherwise cited, all student mobility statistics come from the 2013 *Open Doors Report on International Educational Exchange*, produced by the Institute of International Education (IIE) and sponsored by the U.S. Department of State.



EUROPE AND EURASIA

Albania, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Lithuania, Luxembourg, Macedonia (The Former Yugoslav Republic of), Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom

132 EducationUSA Advising Centers in the Region:

30	Comprehensive
47	Standard
55	Reference

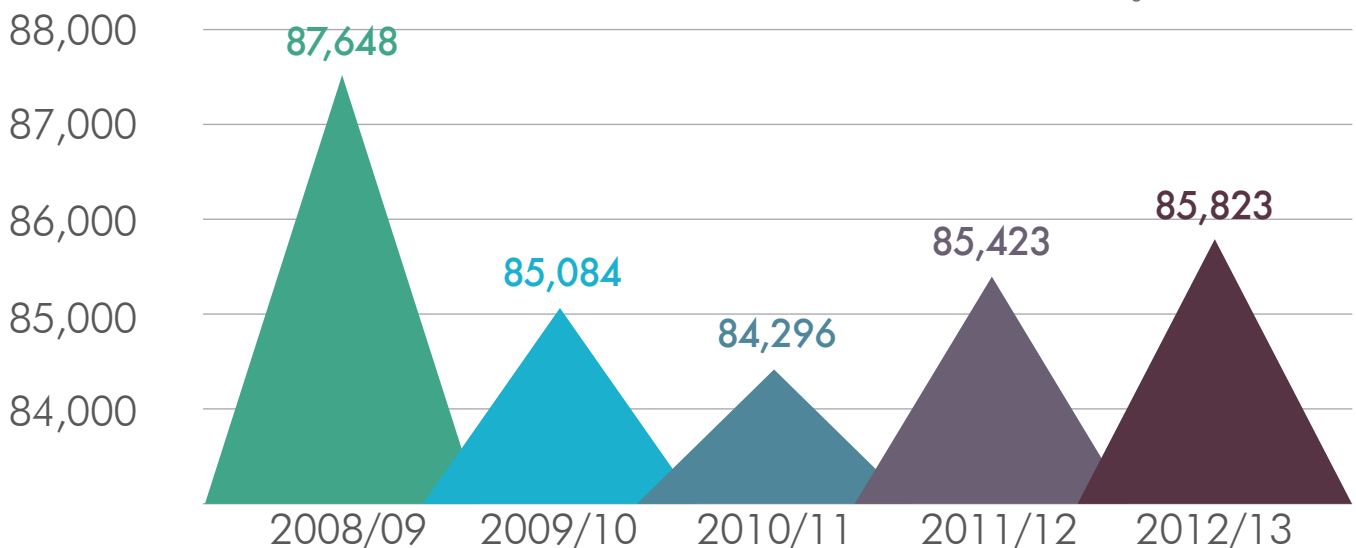
REGIONAL EDUCATIONUSA PROFILE

EducationUSA in Europe and Eurasia is a robust network of advising centers with well-trained and skilled advisers who provide support not only to students who wish to study in the United States, but also to higher education institutions interested in recruiting and establishing linkages with European/Eurasian partners. Advising centers can be found in Fulbright Centers, American Councils, American centers, partner universities, and local NGOs.

In order to support U.S. higher education institutions with their recruitment goals, over the past year EducationUSA Europe/Eurasia expanded virtual outreach, increased the number of coordinated college fairs, and engaged more U.S. study abroad students. EducationUSA centers report exceptional interest in studying in the United States with more than half a million contacts in calendar year 2013.

September 2014 will bring a very special opportunity for advisers and U.S. higher education representatives to come together in Tbilisi, Georgia for the EducationUSA Europe/Eurasia Regional Forum.

Student Mobility (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.



REGIONAL OVERVIEW

Europe and Eurasia is a strong, vibrant, and dynamic region with institutions eager to link with U.S. partners and offers well-prepared, diverse students, many of whom are able to afford the financial costs of study in the United States. Perhaps counter-intuitively, U.S. enrollment has actually increased from countries hit hardest by the economic crisis—Greece and Spain. Many youth understand that opportunity lies in the acquisition of skills that can help them stand out in the job market, namely language skills (particularly English) and work experience (internships/practical training). U.S. higher education is increasingly perceived not only as desirable, but also as essential.

As more and more U.S. institutions are recognizing three-year Bologna-compliant degrees, access and appeal for Europeans/Eurasians to pursue graduate studies in the United States improves.

In 2013, EducationUSA college fairs brought record numbers of U.S. institutions to Europe and Eurasia, and they were met by enthusiastic crowds in every city. Highlights include the UK College Day in London, which featured 194 exhibitors from 170 universities (up from 92 universities four years ago) and 4,500 visitors; and the Eurasia Tour, which was launched in 2010 with eight U.S. colleges visiting three cities and expanded by 2013 to include seven cities in six countries, more than 6,000 fair visitors, and 52 colleges and universities. U.S. representatives consistently praise both the quantity and quality of students they meet at EducationUSA college fairs in Europe and Eurasia and overwhelmingly report

that the fairs are cost effective and yield excellent return on investment.

EducationUSA advising centers initiated new competitive college clubs in Spain and Belarus to add to the existing clubs in Armenia, Azerbaijan, Cyprus, Georgia, Macedonia, Portugal, Russia, Ukraine, and the United Kingdom. In addition, advisers in Croatia launched an athletic cohort advising group this year. These activities offer intensive advising to prepare students for applying to undergraduate programs in the United States.

The Opportunity Funds program is expanding in the region with new programs in Bosnia and Serbia. Opportunity supports talented, economically disadvantaged undergraduate and graduate students with high academic potential with the upfront costs of applying to U.S. institutions and is now available through EducationUSA Advising Centers in five countries, including Belarus, Russia, and Ukraine, in addition to Bosnia and Serbia. EducationUSA continues to conduct extensive outreach to broadcast these options to both prospective undergraduate and graduate students.

Since 2007, EducationUSA Opportunity Funds programs in Eurasia have assisted more than 500 students from Belarus, Russia, and Ukraine to apply to study in the United States. The results are impressive – 278 Opportunity students received 387 offers of admission and \$11.8 million of first-year funding. Opportunity students bring cultural and economic diversity to U.S. campuses, they are among the most academically talented candidates from their countries, and they are extremely well prepared for higher education in the United States.

RECENT TRENDS

- 85,823 students from Europe and Eurasia studied in the United States, an increase of .5 percent. While European Union (EU) countries aggressively compete for international students, interest in studying in the United States among Europeans remains strong.
- Notable growth in student mobility was seen in particular in Slovenia (33 percent), Luxembourg (28 percent), Malta (24 percent), Czech Republic (11 percent), Denmark (10 percent), Sweden (nine percent), Finland (eight percent), and Russia (eight percent increase in undergraduates, two percent increase overall).
- Nearly 40 percent of European and Eurasian students pursued undergraduate degrees and 34 percent graduate studies with the remainder enrolled in non-degree programs and Optional Practical Training. The trend continues as more and more European/Eurasian students are pursuing full degrees at the undergraduate level in the United States.
- For the first time in many years, the former Yugoslav countries of Bosnia and Herzegovina, Croatia, Macedonia, and Slovenia have seen promising increases in student mobility with Bosnia reporting increases of seven percent, Croatia five percent, Macedonia seven percent, and Slovenia 33 percent. All have very strong EducationUSA centers with advisers eager to work more closely with U.S. higher education institutions. These countries were also on the first EducationUSA Southern Europe Tour in March 2014.
- Hungary saw its first increase in U.S.-bound students since 2010 with a five percent increase. There was a 12 percent increase in students interested in undergraduate study. In addition to Budapest, the EducationUSA network includes advising centers in Pecs, Debrecen, and Veszprem. The centers coordinate efforts to promote U.S. study. Hungarian students are interested in master’s level studies in environmental and geosciences, visual arts, international relations, and various interdisciplinary fields, e.g. medical economics, healthcare design, and technologies for interaction with disabled children. Students from Hungary are also looking for short-term study programs, as well as PhD research possibilities.
- Iceland has been gradually emerging from the economic crash of 2008, and students are willing to invest more in their education. This is combined with favorable government loans for students who study abroad, both at graduate and undergraduate levels.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	% Change from 2011/12
Turkey	11,278	-5.8%
Germany	9,819	5.0%
United Kingdom	9,467	3.1%
France	8,297	0.8%
Spain	5,033	2.2%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
Norway	1,349	2,097	55.4%
Kosovo	75	106	41.3%
Denmark	999	1,359	36.0%
Spain	3,849	5,033	30.8%
Sweden	3,279	4,283	30.6%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

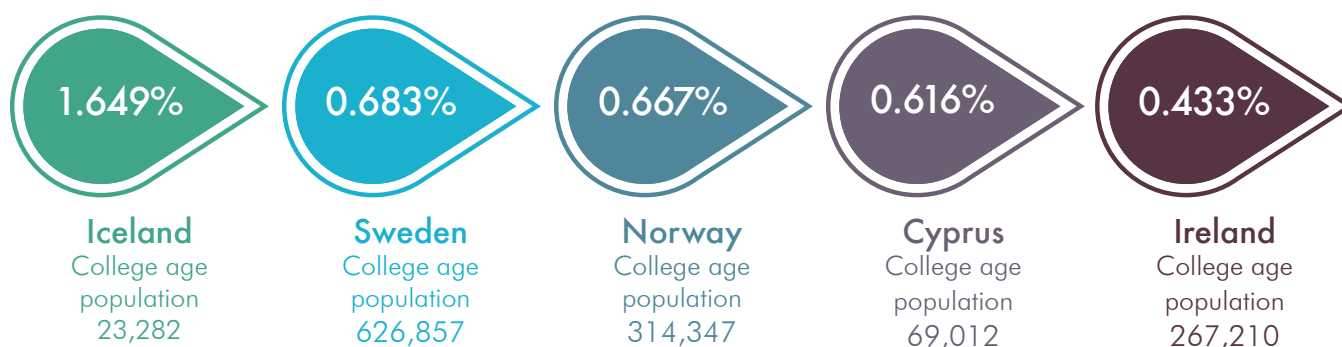
55.4%

Norway has the largest percentage growth in the region over the last five years (with over 100 students)

According to the Icelandic Student Loan Fund, the United States currently ranks second after Denmark as the most popular destination for Icelandic students studying abroad.

- Mobility from Azerbaijan continues to be strong, up 22 percent from five years ago and 40 percent from ten years ago. Azerbaijanis studying at the undergraduate level in the United States increased 46 percent in the past five years, including a 16 percent increase at community colleges.
- Innovative programming in Moldova brings a new, portable EducationUSA advising corner to different locations throughout the country, offering on-site advising services to students who previously had limited access to in-person EducationUSA advising.
- Drastic public spending cuts in Greece have led to a crisis in its higher education system. Since 2009, the higher education budget has been cut by 23 percent. This, coupled with the high unemployment rate in Greece estimated by EU to reach 26 percent in 2014 for all job-seekers, has led to a steady increase in the numbers of well-qualified students who are seeking higher education in the United States. This group, which is heavily interested in undergraduate programs, also includes competitive athletes looking for sports scholarships. This past year, the number of undergraduate students in the United States increased by 15 percent. Over the past five years, there has been a 59 percent increase in enrollment in non-degree programs, and more students are exercising the OPT opportunity.
- With more than 143,000 domestic students, Lithuania boasts a robust and growing higher education system. There are more Lithuanians who have completed higher education (31 percent) than the European Union average of 25 percent. Women's representation in higher education is also very high. Ninety percent of Lithuanians speak at least one foreign language, and half the population speaks two foreign languages, typically Russian and English. Many students take advantage of the Erasmus exchange programs, which contribute to the diversity and global mindset of the student body and prepare them for a U.S. study experience.
- For many years, Cyprus sent the highest number of students per capita to the United States for study, largely due to generous funding from USAID, as well as the governments of Cyprus and the United States. Though the scholarship programs are ending and the numbers of Cypriot students headed to the United States have declined, interest in U.S. study remains strong. Cypriot students are academically prepared, and the EducationUSA center continues to implement a Competitive College Club that has been successful in generating more than \$2 million in scholarships for Cypriot students. The EducationUSA center in Cyprus has also worked creatively with several state consortia like Study Texas and Study Wyoming to promote a variety of U.S. destinations for Cypriot students.
- Portugal is a host country to more than 7,500 European students on study abroad programs. Portugal is also the study abroad destination for nearly 9,000 African students, 6,000 South-American students and nearly 1,000 Asian students. English is Portugal's second most spoken language, and Portuguese students' average TOEFL score is 95. Portuguese students and international students currently in Portugal who are working with EducationUSA are very interested in STEM fields.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

- Serbia and Bosnia and Herzegovina have established new Opportunity Funds programs to support up-front application costs for promising undergraduate and graduate students who have limited financial means. Both programs will work closely with a cohort of talented students over 18 months through a strong advising program that includes test preparation and application guidance.

COUNTRIES IN THE SPOTLIGHT

Albania: The ribbon was cut on a new advising center in Tirana, Albania in 2012. The dynamic new center already has two locations and is reaching out to increase the numbers of students served. Several television appearances by the EducationUSA adviser in 2013, as well as broad outreach throughout the country, have led to more awareness of U.S. study and the services EducationUSA offers. More than one-fourth of Albanian students in the United States are interested in community colleges. English language bridge programs are also of interest.

France: France, with its large number of exchange and direct linkage study abroad programs, is the fourth top sending country in the region with a 12 percent increase over the past five years. French students continue to be highly interested in U.S. study including undergraduate programs and community colleges (which receive 20 percent of French students studying in the United States). EducationUSA is expanding efforts to reach students throughout France. An America House was established this past year in Lyon, France's second largest city and second largest student population. America House offers testing to students in the Rhône-Alpes region and works closely with the Paris EducationUSA center to provide advising to interested students.

Germany: Germany continues to be an important partner with a 12 percent increase in the number of Germans studying in the United States over the past 10 years, and up 5 percent last year alone. German students are increasingly seeking short-term opportunities in the United States, including internships, skill-building programs, and high school exchanges, and the number of Germans on non-degree programs has grown by 58 percent in the past five years, according to *Open Doors*. The number of German students studying outside the country hit a record high in 2013 at 134,000.

Norway: In early 2014, the Norwegian Ministry of Education approved approximately 200 U.S. universities as eligible destinations for Norwegian students to use

government funding, including during the freshman year, starting in 2015. These U.S. higher education institutions were chosen based on rankings by the *Times Higher Education Supplement*, the Academic Ranking of World Universities (ARWU,) or the QS World University Rankings. The complete list may be found on the website of the Association of Norwegian Students Abroad (ANSA): <http://ow.ly/uLdJz>. Further information for potential Norwegian students can be found on the same site. EducationUSA is translating the information and will make it available to U.S. higher education institutions.

Russia: Student mobility increased for the second year in a row, and Russia maintains its place as the sixth highest sending country in Europe/Eurasia and 26th globally. An eight percent increase of Russian undergrads fueled an overall two percent increase in Russians pursuing higher education in the United States last year. The birth rate in Russia is also on the rebound with the population of 0-14 year olds up 11 percent in the past five years. Last year, 40 percent of Russians in the United States were undergraduates with a full one-third enrolled at community colleges. The burgeoning middle and upper classes in Russia have the means and interest to send their children abroad for higher education, and U.S. colleges and universities have excellent recruitment opportunities, especially outside of Moscow. EducationUSA advisers witnessed the increasing demand first-hand, recording a 54 percent increase in contact with prospective students during the past year, reaching over 3,200 people in September 2013 alone. The new Global Education scholarship program, which will support graduate studies in target fields, is expected to increase interest in and access to U.S. graduate programs.

Serbia: Serbia's student talents are currently represented in colleges and universities in 49 of the 50 states with interests ranging from the fine arts to engineering. The EducationUSA center in Belgrade counsels students with interest at all levels, from community college to MBA and PhD programs. Last year's EducationUSA Serbia survey of 42 U.S. bound students indicated annual family contributions of more than \$765,000—nearly double last year's reported family investment in U.S. higher education. This same group also garnered more than \$1 million in financial aid. The EducationUSA center in Serbia is a full-service center, offering test preparation, testing, virtual, individual, and cohort advising, in addition to the new Opportunity Funds program.

Spain: Spain is the fifth largest sending country in Europe and has experienced one of the biggest mobility shifts over the past five years with a 30 percent increase in

the number of students traveling to the United States for tertiary education. Spanish students are very interested in U.S. study at both graduate and undergraduate levels. The EducationUSA center reports that close to 50 percent of their nearly 5,000 contacts are interested in graduate education—the majority in master's programs—but a fair amount in PhDs as well. About 20 percent of advisees are interested in undergraduate study, but this number is on the rise as can be seen from the recent *Open Doors* report. To serve this growing market, EducationUSA launched a Competitive College Club in the summer of 2013. About 15 percent of students seen by the EducationUSA center are interested in summer study or ESL.

Sweden: Interest among Swedish students for studying abroad is high, and, despite fewer students of university age, there are no signs that interest is decreasing. Twenty percent of Sweden's globally mobile students study in the United States, making it the second most popular destination after the United Kingdom. Currently almost 4,300 Swedish students are attending U.S. schools, an increase of 31 percent over the past five years. Overall, the knowledge of English is good among Swedish students and therefore many prefer to study in English-speaking countries. Seventy percent of Swedes in the United States are undergraduates, thanks to continued financial support from the Swedish Board for Study.

Turkey: Turkish students continue to seek higher

education outside the country as each year nearly one million are unable to enter Turkish universities due to insufficient capacity. Despite efforts to expand higher education opportunities with online programs, Turkey faces an enormous challenge to meet the growing need and demand of 45 percent of its population under 25 years old. Turkey's GDP has tripled in the past 10 years and is among the top 15 worldwide, making education abroad not only desirable, but also affordable for a significant segment of the population.

Ukraine: Increased activity by U.S. colleges and universities to attract students from Ukraine has contributed tremendously to maintaining mobility numbers, despite the declining population of 15-25 year olds. Representatives of 29 U.S. higher education institutions participated in the U.S. Education Fair in Kyiv in November 2013, the largest delegation of U.S. college and university representatives ever to visit Ukraine. The very first group of U.S. institutions to travel to the regional city of Dnipropetrovsk was met with such enthusiasm that this high-tech hub with excellent science and engineering students has been added to the 2014 Eurasia Tour. Community colleges continue to draw significant numbers of Ukrainian students: 41 percent of Ukrainian undergrads in the United States in 2012-2013 enrolled in community colleges, up from 36 percent five years ago.

In calendar year 2013, EducationUSA in Europe and Eurasia made 1,572,799 contacts.



298,770 contacts made through advising centers		264,013 contacts made through outreach activities		1,010,016 contacts made through virtual platforms*	
Advising Center-based Contacts	297,351	Education Fairs	168,340	Social Media Platforms	1,007,567
U.S. Institution Representative Visits	1,419	American Corners / Centers	12,804	Webinars / DVCs	2,449
		Local Universities / Secondary Schools	51,865		
		Other Fairs / Conferences / Seminars	15,130		
		Host Government Events	889		
		Embassy / Consulate Events	7,549		
		Public Locations	3,091		
		Other Activities	4,345		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

United Kingdom: Between 2011-2012 and 2012-2013, the United Kingdom saw a five percent increase in the number of undergraduate students in the United States, marking the greatest increase in 10 years, and the impact of higher university fees for students in the UK system. Over the past three years, the number of UK students taking the SAT has increased by more than 25 percent, and there was a 68 percent increase in students taking the ACT in the past year. These figures, combined with almost 4,500 attendees at the USA College Day fair last autumn, make it clear that British students are looking to the United States as an education alternative.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

The debate in Europe on internationalization of education and the “right way” to promote internationalization is expected to continue over the next several years. European higher education institutions were among the global pioneers in the conceptualization and implementation of internationalization and are expected to continue to develop and refine its meaning. On one side, some governments are promoting efforts to move science and research into a profit-making arena, subject to commercialization, while defenders of the idealistic notions surrounding internationalization and its benefits argue it should be used to improve the diversity and quality of an institution rather than simply as a marketing strategy or to raise funds through tuition fees.

- U.S. universities seeking partnerships in Europe will find their European counterparts motivated and experienced in coordinating exchange programs or visiting professor agreements especially in STEM fields. Through partnerships with research institutions, U.S. researchers can benefit from European grant funding and access pan-European research networks. In the Baltic States, for example, interest in the use of technology in teaching is also very high, motivated by the excellent internet connectivity in those countries. See below for further information on European S&T funding.
- European universities and private platforms are starting to catch up to their U.S. equivalents in developing Massive Open Online Course (MOOC) offerings. Iversity from Germany, FutureLearn from the UK, and MiriadaX from Spain are some of the largest. OpenupEd, launched in April 2013, was the first Europe-wide MOOC initiative with support from the European Commission. By now, 64 courses covering a wide variety of subjects have been made available in

12 different languages offered by 11 different European university and other institutional partners.

- The launch of the “Erasmus+ program in January 2014 by the European Commission provide EU students more opportunities to participate in short-term programs outside the EU. In the past, the program supported only intra-European mobility. The newest incarnation of this highly successful program aims to involve two million students in higher education over the next seven years. U.S. and EU universities that have signed inter-institutional agreements can send and receive supported students, doctoral candidates, and staff for up to 12 months. While this initiative provides opportunities, it may also increase competition for EU students. In addition to the Erasmus+ grants for short-term studies in other European countries, European students can access student loans for master’s degrees in other European countries (12,000€ for a one-year master’s and 18,000€ for a two-year master’s). These will be at better-than-market interest rates, and repayment will commence after two years. This loan program will launch in fall 2014, and the European Commission predicts 200,000 students will participate. The result could be competition for U.S. higher education institutions, especially at the graduate level, where there has been an overall decrease in interest from European students. U.S. higher education institutions can counter this by offering more financial aid to Europeans at the graduate level.
- Watch for news about the \$30 million STEM Higher Education grant competition from the Millennium Challenge Corporation in the Republic of Georgia. The approved implementers will institute a program supporting “the modernization of science, technology, engineering, and math education by offering

Erasmus+
aims to involve
2 million
EU students over the next
7 years

high-quality bachelor degree programs that boost productivity and increase employment opportunities.” U.S. dual-degree programs may be an option, and expected outcomes include increased competitiveness of Georgian undergraduates for STEM graduate programs abroad.

- The Dutch government has proposed a structural change in the federal student grant system, moving towards a system of federal aid, starting academic year 2015-2016. For the majority of prospective students, this means that the family contribution towards their educational costs will rise approximately 3,500€ per academic year. Dutch universities witnessed an eight percent increase in freshman matriculation with fewer incoming Dutch undergraduates willing to take a gap year, a period when they might consider going to the United States. This trend is expected to continue in academic year 2014-2015. However, afterwards, with the rise in costs to study at home in the Netherlands, Dutch students may opt to study abroad, including in the United States.

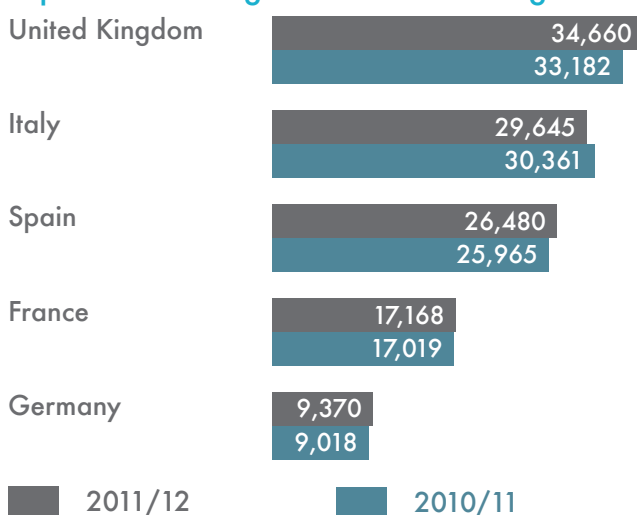
FOREIGN GOVERNMENT AND PRIVATE FUNDING

Governments in 18 European and Eurasian countries offer scholarship programs for their citizens to study abroad: Austria, Azerbaijan, Cyprus, Czech Republic, Estonia, France, Georgia, Macedonia, Netherlands, Norway, Romania, Russian Federation, Slovak Republic, Slovenia, Sweden, Switzerland, Turkey, and Ukraine.

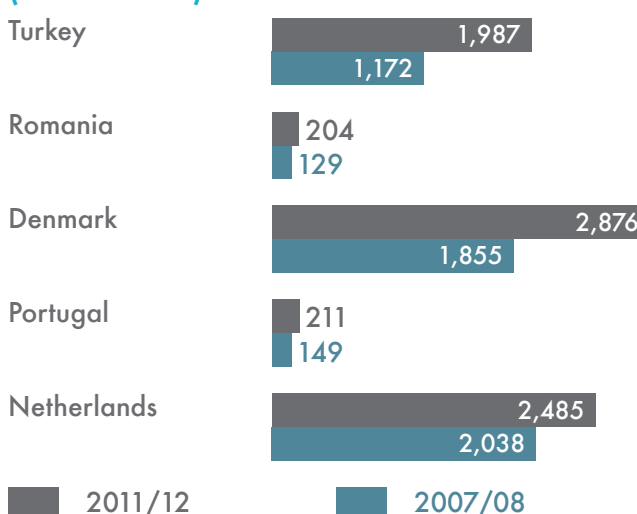
- The Ministry of Education and Science of Georgia provides funding for all levels of study (bachelor's, master's, PhD) and for all fields of study. Last year, the Ministry agreed to consider all accredited U.S. institutions instead of only those top ranked by *U.S. News & World Report* as had been originally announced. In 2013, the first year of the scholarship program, 16 of the 60 scholarships awarded were for students entering U.S. colleges and universities. Applicants should contact the EducationUSA center in Tbilisi for more information.
- The Ministry of Education and Science in Macedonia awards scholarships for academic studies to students accepted to either one of the top 100 ranked universities or the top 200 ranked universities in the field of technical sciences according to the latest Academic Ranking of World Universities (ARWU) published by the Center for World-class Universities in Shanghai Jiao Tong University. Contact biljana.zafirovska@mon.gov.mk for more information.

- Several programs in Russia award scholarships for study abroad, including the new Global Education Program, which funds graduate studies in high-tech (engineering), public administration, education administration, and social services fields (particularly public health and health administration). More information is available on the EducationUSA in Russia site, <http://ow.ly/uLerp>.
- Slovenia offers various government scholarships for study abroad. The highest among these is the Ad Futura scholarship. Selected students can receive up to \$35,000 annually for the duration of their program. Learn more at <http://ow.ly/uLfvp>.

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

More than 80 foundations provide scholarships for citizens of specific European and Eurasian countries to study abroad:

- Armenia: More than 15 private foundations provide scholarships for Armenians to study in the United States, <http://ow.ly/uLfzJ>.
- Baltic States: Working through the EducationUSA advising centers in Estonia, Latvia, and Lithuania, the Baltic-American Freedom Foundation offers \$25,000 scholarships to students from those countries to pursue graduate study in the United States, <http://ow.ly/uLfDd>.
- Croatia: Several Croatian foundations award competitive scholarships for Croatian graduate students at targeted U.S. universities, such as Harvard University and Georgetown University, among others. For more information, contact EducationUSA Zagreb.
- Ukraine: WorldWideStudies grants cover university fees, study materials, and health insurance (60 percent of expenses, up to \$50,000) for master's programs. Priority fields include agriculture, environmental studies/ecology, law and public administration, alternative energy, and aerospace engineering, but other fields are eligible for consideration.
- United Kingdom: The Sutton Trust, in partnership with the U.S.-UK Fulbright Commission, is expanding its U.S. program and supports highly talented low and middle income UK youngsters interested in learning more about U.S. higher education. The 2014 program attracted more than 2,000 applications for the 175 available spaces. The UK students attend a one-week summer school in the United States with advising support provided before and after the trip for those interested in applying for undergraduate study in the United States, <http://ow.ly/uLflP> and coverage in the *New York Times*.

For a complete list of European and Eurasian government and private-funded scholarship programs, visit the REAC portals on the higher education section of the EducationUSA website, at www.EducationUSA.state.gov.

VIRTUAL AND SOCIAL MEDIA USAGE

- The Fulbright Belgium YouTube channel was created in 2010 and currently has over 500,000 views and 1,000 subscribers. Students can find videos with tips on how to pursue U.S. higher education, how to apply to universities and internships in the United States, and





how to obtain a scholarship through Fulbright. The advisers interview a variety of students returning from the United States so they can share their experiences and tips. They record videos with students, Fulbright grantees, interns, and participants in exchange programs. In addition, they also interview U.S. university representatives when they come to Belgium for recruitment, mainly to share tips about the college application process.

- The Belarus EducationUSA Advising Center saw significant growth in the number of subscribers to its YouTube channel, as well as a steady increase in membership of the Facebook and Vkontakte groups in 2013. The Russian-language content has gained attention and draws visitors from throughout the Russian-speaking world, particularly in Eurasia and Central Asia. EducationUSA Belarus also launched a short 3-minute promotional video for the center to be used as a calling card for services. The video was viewed 300 times in its first two weeks. Interested in connecting with this talented student market? Contact advising@ehu.lt.
- In 2013, Italy made impressive strides in incorporating educational webinars as cost-effective tools to reach Italian students. This past year, the advisers offered monthly webinars covering the main topics of the U.S. higher education system, e.g. application process, financial aid opportunities, and standardized tests. Advisers also give regular virtual pre-departure orientations to Italian students. On a quarterly basis, the two centers in Rome and Naples collaborate with the Public Affairs Section of the U.S. Embassy to offer a joint webchat to promote U.S. study opportunities. Italy has more than 6,000 Facebook fans and around 1,000 Twitter followers.
- U.S.-based students continue to make an important contribution to advising in Russia as part of the State Department's Virtual Student Foreign Service e-Internship program. The e-interns participate in the internship from their U.S. campuses and assist Russian students interested in studying in the United States, supporting EducationUSA's public diplomacy mission in Russia.
- The Ask an Adviser blog from EducationUSA Moscow grew in popularity throughout its inaugural year and now is read by audiences around the globe. The bilingual posts cover a wide variety of topics for students interested in pursuing higher education in the United States. This blog follows on the launch of the new EducationUSA Russia website, <http://ow.ly/uLg0X>, which provides accurate and comprehensive

information to the Russian-speaking population, as well as resources in English about Russia for U.S. admissions offices, <http://ow.ly/uLg4L>.

- Croatia has 1.5 million Facebook users, nearly 35 percent of its population. The EducationUSA center in Croatia actively promotes educational opportunities in the United States through its Facebook pages with more than 19,000 fans. Its fan base has grown over 55 percent in the past year. One of the pages focuses specifically on scholarship and funding opportunities. Croatia offers virtual group advising programs for students and often organizes virtual sessions with U.S. higher education representatives.
- The advising centers in Skopje, Bitola, and Tetovo, Macedonia have more than 19,800 Facebook fans in total. The centers' advising activities are also regularly promoted on the U.S. Embassy Facebook page, which is the third most popular U.S. Embassy page in Europe with 58,568 fans.

SUCCESSFUL RECRUITING STRATEGIES

- Pursue academically talented student athletes. Advising centers in Croatia and Serbia in particular are working with cohorts of athletes. Most EducationUSA centers in the region are expanding their capacity for athletic advising and are interested in connecting with U.S. higher education institutions with interests in student athletes.
- Promote English language programs, especially in Albania, Bulgaria, Hungary, and Turkey.
- Access schools and universities in more restrictive countries by participating in coordinated EducationUSA fair tours. The 2013 Eurasia Tour attracted more than 6,000 visitors in seven cities and included the largest ever U.S. higher education delegations to these countries.
- Look beyond the capital in Russia. Eager crowds awaited the U.S. delegation on the third annual Siberia/Far East Tour in March 2013. The full-service tour brings a group representing the full range of U.S. higher education opportunities to an eager audience seeking all levels and fields of study. The science and tech hub of Novosibirsk is an especially desirable recruitment stop for STEM programs.
- Expand international student services and promote career development services, including international employment of graduates, especially since student and professional training and mobility will be addressed by the European Commission's *Erasmus for All Program*, set to start in 2014.
- Cultivate relationships with current international students and international alumni. Bring them with you to EducationUSA fairs or ask them to handle your institution's table if you can't travel there yourself.
- Highlight the cost-saving aspect of community colleges and their 2+2 articulation agreements, especially in Eurasia.
- Leverage scholarships, even partial ones. Helping to reduce the cost of attendance even a bit can sometimes make a big impact.
- Set up direct linkage and exchange agreements with European higher education institutions in order to increase your profile. Often an exchange program encourages students to return later for a longer degree program.
- Understand the cultural and procedural differences of university admissions in Europe. The college application process can be less cumbersome in Europe than in the United States—sometimes it involves submitting just one exam result. Students, therefore, tend to leave their applications to the last minute. Prepare for last minute questions and rushed deadlines. You can help overcome this by clearly stating deadlines and working with potential applicants to make sure they are on track.
- Promote funding options at the graduate level, including research or teaching assistantships. Such incentives can be a major factor in the decision to apply and ultimately to attend a U.S. university, as opportunities to develop skills that can help graduates stand out on the job market are especially sought.
- Don't forget to inform parents, other family members, teachers, and other decision influencers. They often need information provided in their native language.

REGIONAL EDUCATIONUSA EVENTS

The **EducationUSA Europe and Eurasia 2014 Regional Forum**, to be held September 22-24, 2014 in Tbilisi, Georgia, will be the flagship event of the year in the region. This unique opportunity, complementing and supplementing the EducationUSA Forum in Washington D.C., will include in-depth intensive networking, mutual learning, and training with advisers from across this broad

and dynamic region. The Regional Forum will provide opportunities for U.S. higher education professionals to learn from expert advisers about student mobility trends and recruitment opportunities in Europe and Eurasia, as well as to update advisers on current higher education issues. There will also be opportunities to network with U.S. Embassy/Consulate personnel, Ministry of Education officials, and university administrators and to reach prospective students.

- **Discover** the prospects, benefits, and cultural diversity that European and Eurasian students bring to U.S. campuses.
- **Explore** opportunities to build educational partnerships between the United States and European/Eurasian countries and foster two-way mobility.
- Identify strategies to increase visibility and **access** to U.S. higher education throughout Europe and Eurasia.
- **Connect** with 100 EducationUSA Advisers from 44 countries, from Reykjavik to Vladivostok.

For further information:

Website: <http://ow.ly/uLcmC>

Subscribe to our Regional Forum Updates list: <http://ow.ly/uLgrY>

FAIRS AND CONFERENCES

Many fall recruitment events in the region are conveniently scheduled around the Regional Forum:

- **EducationUSA Pavilion at EAIE**, September 16-19, 2014, Prague, Czech Republic: Accredited U.S. colleges and universities seeking to raise their profile and meet partner institutions from other world regions at the largest international education conference in Europe are welcome to join the EducationUSA Pavilion. In 2013, the European Association for International Education Conference brought together more than 4,800 higher education professionals from more than 90 countries in Istanbul, Turkey. The EducationUSA Gateway and Pavilion led to increased visibility, student mobility, and income for the 19 participating U.S. exhibitors. To learn more about this year's event, visit <http://ow.ly/uLgzt> or <http://ow.ly/uLgRy>.
- Join **2014 EducationUSA / CIS College Fairs** in London (September 26-27), Paris (September 28), Brussels (September 29), Athens (October 6), and Nicosia (October 8).
- Don't miss the fifth annual **EducationUSA Eurasia Tour**, October 1-10, 2014, and meet thousands of

talented students in Armenia, Azerbaijan, Russia, and Ukraine. The Georgia fair will be held during the Regional Forum.

- The tenth annual **Higher Education & Scholarships Fair**, organized by EducationUSA Croatia, will be held in two major Croatian university cities: the capital Zagreb (October 14, 2014) and the Adriatic coastal city Rijeka (October 16, 2014), presenting study opportunities and student financial aid available in Croatia and abroad. For more information on becoming an exhibitor or participating virtually, contact EducationUSA adviser Sandra Dobric at sdobric@iro.hr or visit the fair webpage.

Academic year 2014-2015 EducationUSA events:

- The second annual **EducationUSA Southern Europe Tour**, including fairs in Portugal, Spain, Slovenia, Croatia, Bosnia, Serbia, and Macedonia. The tour was successfully piloted in 2014 and we look forward to continuing to offer this opportunity on an annual basis. Tentatively planned for March/April 2015.
- The fourth annual **EducationUSA Russia Siberian Tour**, a full-service tour, will include fairs in three to four cities, including the science and tech hub Novosibirsk and the Far East capital Vladivostok. Tentatively planned for March 2015.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

September–November, March–May

U.S. STUDY ABROAD IN THE REGION

European countries remain the top choice for U.S. students studying abroad, according to the Institute of International Education's *Open Doors Report on International Educational Exchange*. Europe/Eurasia hosts 66 percent of all study abroad students with the United Kingdom, Italy, Spain, and France as the top host destinations. Several non-traditional destination countries are demonstrating noteworthy growth (over 10 percent) including Bosnia, Bulgaria, Cyprus, Denmark, Estonia, Iceland, Latvia, Lithuania, Slovenia, and Ukraine.

U.S. study abroad in Germany continues to climb, witnessing a 14 percent increase over the past five years, and the number of U.S. students in Germany roughly equals the number of German students studying in the U.S. According to the German Academic Exchange

Service's (DAAD's) New York office, there are many dynamic and innovative programs taught in English that draw a wide audience of both traditional and non-traditional U.S. students and researchers to Germany. The quality of German research adds to the attraction. Germany reached its goal of spending three percent of its GDP on Research and Development with increased contributions to German universities and research institutes.

The Czech Republic continues to be a favorite destination for U.S. students, in seventh place in Europe, and seventeenth worldwide. The past ten years were witness to a 210 percent increase in the number of U.S. students studying there. Czech universities have been actively forming partnership agreements with their U.S. counterparts, fueling mobility in both directions.

NEW EUROPEAN UNION PROGRAMS: OPPORTUNITIES FOR U.S. PARTICIPATION

Erasmus+ (<http://ow.ly/uLhmO>)

On January 1, 2014, the European Commission and its Directorate-General for Education and Culture launched the Erasmus+ program to provide students more opportunities for short-term mobility. This program aims to involve four million participants, including two million in higher education, over the next seven years. In the past, Erasmus focused on intra-European mobility. Erasmus+ will supplement these achievements by promoting Europe's cooperation with the rest of the world, including the United States. There are a number of options U.S. universities can explore:

- U.S. and EU universities can send and receive students, doctoral candidates, and staff for short-term mobility up to 12 months. HEIs must sign inter-institutional agreements which are based on the terms and principles of the Erasmus Charter.
- U.S. universities may be part of a consortium led by EU HEIs, with the consortium universities awarding double or multiple degrees. All institutions design and deliver the program to the students.
- U.S. universities and NGOs can participate in projects that foster dialogue on international education and mobility and promote study in the EU. This includes the Fulbright-Schuman Program, jointly financed by the U.S. State Department and the Directorate-General for Education and Culture of the European Commission, that funds graduate and post-graduate study, research, and lecture proposals in the field of U.S.-EU relations, EU policy, or EU institutions for interested American and EU citizens. Since its inception approximately 250 Americans and Europeans have participated. See: <http://ow.ly/uLhBQ> for application criteria.

Bilateral Science and Technology Agreement

The United States and the European Union have a cooperation agreement in science and technology, which provides a framework to enhance and develop science, technology, and innovation partnerships and offers scope for institutional and individual cooperation. See: <http://ow.ly/uLkTs>.

Jean Monnet Activities

Jean Monnet Activities aim to promote teaching and research on European integration worldwide among academics, learners, and citizens, notably through the creation of Jean Monnet Chairs and other academic activities and to support the activities of academic institutions or associations active in the field of European integration studies. HEIs can propose Jean Monnet-branded modules, chairs, and Centers of Excellence. See: <http://ow.ly/uLhR8>.

Horizon 2020

Horizon 2020 supports Marie Curie Fellowships to individual researchers regardless of their nationality or field of research and opportunities for HEIs to partner in a consortium organized by European institutions. See: <http://ow.ly/uLjKL>.

European Research Council

Researchers from anywhere in the world can apply for European Research Council (ERC) grants, provided the research they undertake will be carried out in an EU member state or associated country. See: <http://ow.ly/uLjVl>.

European Institute of Innovation and Technology (EIT)

EIT is not a single institution, but rather functions through numerous "Knowledge Innovation Clusters" to bring together HEIs, research, and businesses to solve current societal problems. U.S. institutions may be partners in EIT projects in consortia led by EU institutions. See: <http://ow.ly/uLI50>.

MIDDLE EAST AND NORTH AFRICA

Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, West Bank and Gaza, Yemen

27 EducationUSA Advising Centers in the Region:

19 Comprehensive
7 Standard
1 Reference

REGIONAL EDUCATIONUSA PROFILE

EducationUSA advising centers in the Middle East and North Africa (MENA) are located in U.S. embassies and consulates, AMIDEAST offices, and Fulbright commissions. EducationUSA advising activities in Iran and Syria are conducted virtually.

In the Middle East and North Africa, each advising center tailors its programs and activities to the local market. EducationUSA advisers provide guidance to government scholarship offices in Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates. Their efforts include connecting these offices with potential U.S. higher education institution partners. They also assist scholarship students in finding appropriate study opportunities in the United States.

EducationUSA advisers in countries experiencing political and social change (Egypt, Libya, and Tunisia) continue to see large numbers of interested students. In Egypt, bright students continue to seek out support from EducationUSA centers in Cairo and Alexandria while in Tunisia the EducationUSA adviser has expanded outreach efforts and is interacting with greater numbers of students from areas outside of the capital, Tunis. Advisers in Jordan and Lebanon have seen increasing numbers of Syrian students contacting their centers for information about studying in the United States.

In the region's six competitive college clubs (CCCs), advisers meet bi-monthly with top high school students to prepare them for study on U.S. campuses and to guide them through the college application process. Advisers work with students to find the best institutional fit—

academically, socially, and financially. CCC activities include community service projects, book clubs, poetry recitals, spelling bees, speakers, test preparation, and information sessions on the application process. All clubs encourage student leadership initiatives. More than 100 students from the NEA region have successfully completed the CCC program and are in the United States or heading there in fall 2014.

Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Egypt, Lebanon, and Tunisia.

College counselor groups in the region convene high-school counselors to promote best practices and cover topics such as student visas, writing school profiles, application timelines, and how to help students select the institutions that best meet their needs. The EducationUSA network provides members of college counselor groups with mini-libraries of college advising resources as well. Advisers' cooperation with these counselor groups helps to ensure that visiting U.S. admissions officers have productive trips and can interact with a broad range of students.

REGIONAL OVERVIEW

The Middle East and North Africa region extends from Morocco in the west to Iran in the east. Many countries in the region continue to experience economic, political, and social unrest that influences student choices about studying in the United States. In some countries in the region, particularly in the Gulf, governments are



maintaining or even expanding generous scholarship programs to send their students abroad to pursue higher education.

In remarks published in 2012, the International Monetary Fund (IMF) director for the Middle East and Central Asia Department noted that about 25 percent of the region's youth (between the ages of 15 and 24) is unemployed. At the same time, the demand for postsecondary education far exceeds the capacity of local universities. Additionally, the quality of the higher education systems leaves many students without the necessary skills to enter a competitive labor market.

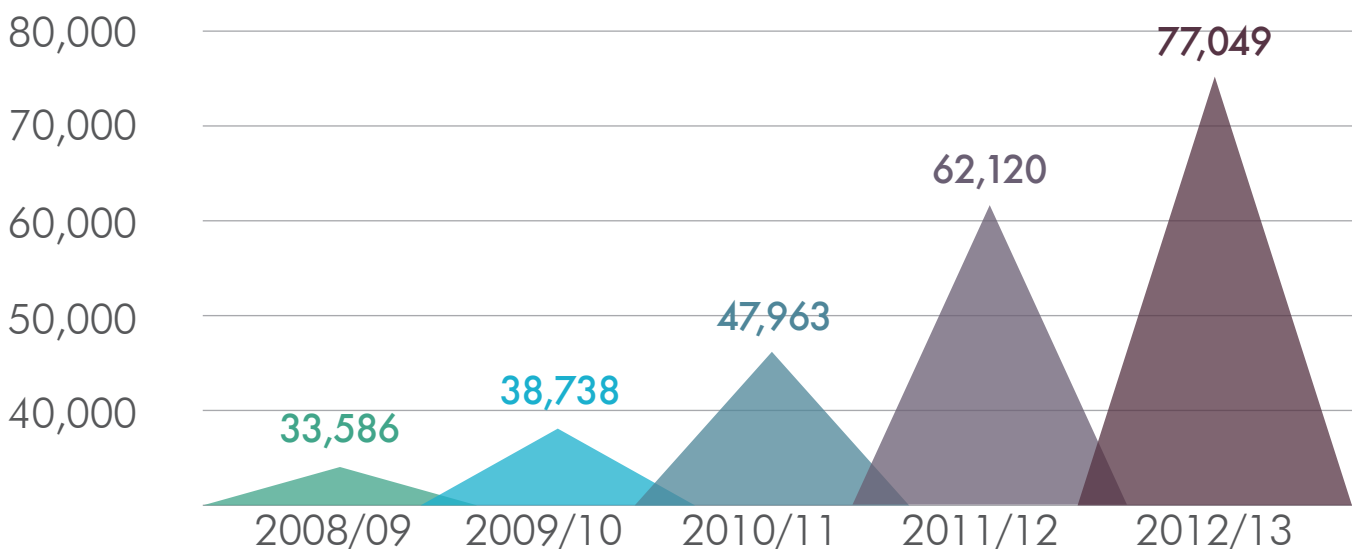
Countries such as Qatar, Saudi Arabia, and the United Arab Emirates remain interested in exploring the benefits

of community colleges and have included some on their lists of approved institutions for scholarship recipients. Other countries in the region have engaged both the U.S. government and U.S. colleges and universities about expanding local higher education capacity through institutional linkages. This is especially true in countries like Iraq and Libya.

Universities in the Gulf are interested in hosting American-educated professors to develop the capacity of their own universities and express eagerness to engage with U.S. faculty interested in collaborative research and teaching opportunities. While students in the Gulf region have relatively better access to universities in their home countries, they have a strong interest in pursuing

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.



education in the United States, particularly at the graduate level. The United States remains the top higher education destination for students from this region, as reflected in the 26 percent increase in the number of Middle Eastern students and the 8 percent increase in North African students enrolled at U.S. colleges and universities in 2012-2013 (*Open Doors*, 2013).

RECENT TRENDS

- Many universities in the region want to develop linkages with U.S. institutions. The EducationUSA REAC and advisers continue to engage local institutions on how to identify appropriate U.S. partners and develop effective, reciprocal student and scholar exchange agreements.
- Scholarship programs funded by governments are being renewed or expanded in scope. In Kuwait and Oman, the government has increased the number of scholarships available for qualified students. In Saudi Arabia, the government recommitted to funding the King Abdullah Scholarship Program for several more years.
- *Open Doors* data show a significant decrease in the number of U.S. students studying in North Africa. The events taking place in Egypt, once a popular destination for American students, explain much of the decrease.
- Many countries in the region want their workforces to include professionals trained in the United States. Governments support this goal through scholarship programs, short-term grants for faculty, and short-term training programs for government officials and administrators.
- Students continue to study in destinations other than the United States for reasons such as Canada's quick track to citizenship and the United Kingdom's geographic proximity. Regional changes in governments and economies related to the Arab Spring have led many families to pursue study opportunities in countries with a related path to citizenship.

COUNTRIES IN THE SPOTLIGHT

Kuwait: The government of Kuwait continues to increase the number of scholarships awarded to undergraduate students for study in the United States. Scholarships are announced in July.

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	% Change from 2011/12
Saudi Arabia	44,566	30.5%
Iran	8,744	25.2%
Kuwait	5,115	37.4%
Egypt	2,608	18.5%
Israel	2,430	-2.4%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
Oman	271	980	261.6%
Saudi Arabia	12,661	44,566	252.0%
Iraq	359	1,074	199.2%
Kuwait	2,031	5,115	151.8%
Iran	3,533	8,744	147.5%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*, 2009-2013.

261.6%

Oman has the largest percentage growth in the region over the last five years (with over 100 students)

Oman: The government of Oman has recently expanded the number of scholarships offered to qualified Omani students. *Open Doors* data reveal that Oman experienced the largest jump in students studying in the United States, at 980 in 2012-2013 from 538 in 2011-2012.

Saudi Arabia: The government of Saudi Arabia has recommitted funding to the King Abdullah Scholarship Program for the next several years, reflecting the country's willingness to invest heavily in providing its students with quality American educations at both the undergraduate and graduate levels.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

- Overall, American institutions of higher education can expect to see sustained interest from countries offering government scholarships with an emphasis on graduate education and professional master's programs.
- Issues of economic and social integration continue to plague North African countries and while interest in studying in the United States is strong, stable household incomes are few. Political instability in some countries post-revolution has inhibited the establishment of institutional linkages, but the U.S. government continues to find ways to support youth development and education.
- Governments look to the United States for educational expertise and are eager to send students abroad to gain the knowledge and skills they need to contribute to higher education reform at home. American institutions should expect more calls for partnerships, linkages, and U.S. faculty visits to the region, as institutions in the region see their U.S. counterparts as models from which they can learn. Many universities in

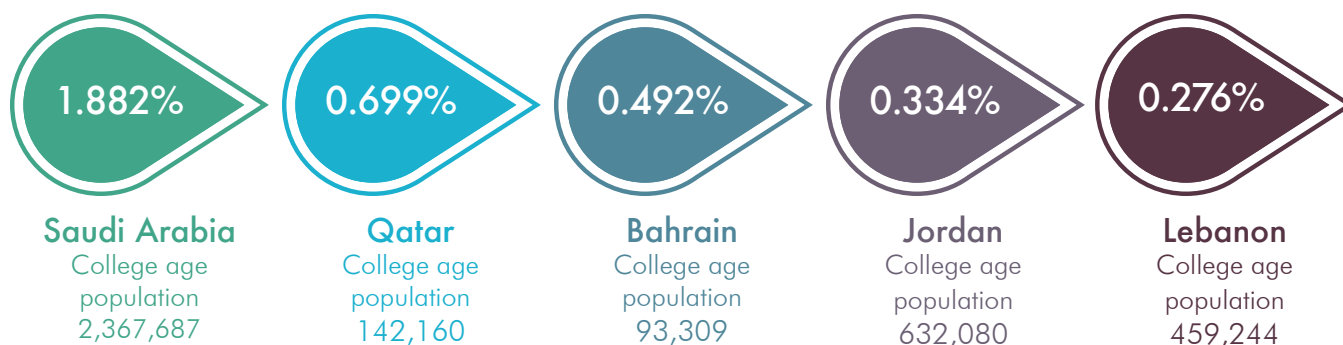
the region have funding to send faculty to the United States for training in teaching methods, advanced research, and administration.

- Despite a reluctance to allow young women to leave home for study in the United States, EducationUSA advisers continue to highlight America's 52 women's colleges as excellent options for young women. Similarly, Education USA advisers promote summer school and high school opportunities to encourage and ease the transition to a U.S. higher education campus.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- Bahrain, Egypt, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, and the United Arab Emirates currently have government scholarship programs. Among the chief barriers to recruiting funded students is that many governments maintain exclusive lists of approved U.S. institutions and will only support study at vetted colleges and universities. One strategy to raise awareness about U.S. institutions and increase the chances of inclusion on these lists is to visit the cultural missions of these countries in Washington, D.C. or to reach out to them directly by email or phone. A visit or phone call provides the opportunity to give information about programs of study, as well as to express interest in hosting students from the region.
- Many governments sponsor their own college and university fairs and appreciate the attendance of U.S. institutions. EducationUSA advisers can provide guidance on participating in these events and facilitate communications with ministries of higher education. Countries that regularly sponsor these events include Iraq, Oman, Saudi Arabia, and the United Arab Emirates. U.S.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

institutions of higher education could send faculty to EducationUSA-sponsored events where staff can arrange faculty-to-faculty dialogues and provide U.S. higher education representatives with a focused approach toward collaborative research projects.

- Many oil companies in the region and other private firms offer scholarships to their employees. These funds are available for current and future employees working in the science, technology, mathematics, and engineering (STEM) fields. SABIC and Saudi Aramco have programs for high school students who are on track to become employees at these companies following university training in the United States.

VIRTUAL AND SOCIAL MEDIA USAGE

- According to Internet World Statistics (<http://ow.ly/uLbIS>), there are 155 million internet users in the NEA region. Internet connectivity is generally sufficient both in homes and cyber cafés in large cities with the exception of Algeria and Yemen.
- The EducationUSA adviser for Iranian students, based at the Institute of International Education in Washington, D.C., provides guidance to students virtually. The adviser also supplies helpful information about the Iranian higher education system to the U.S. higher education community.
- The EducationUSA Iran website received nearly 200,000 visits in 2013, and almost 9,500 individuals subscribe to its e-newsletters.
- The virtual adviser for Syrian students continues to assist Syrian students through Skype, email, and a blog designed to highlight Syrian students in the United States.
- Facebook is the most visited website in most of the region, and now includes more than 40 million users. YouTube is widely used by students to view university videos. Even in countries where the site is banned, students access it through a proxy server. This year, EducationUSA Saudi Arabia used YouTube to reach more than one million Saudi students and parents with a video series about studying in the United States called *Amreeka 101*.
- Twitter's popularity continues to increase, most likely because Arab audiences generally prefer to gather information through dialogue and Twitter's conversational nature is appealing.
- Since the cultures in the region value face-to-face and verbal interaction, platforms, such as EdUSA Watchitoo interactive webinars, provide promising opportunities to engage youth while also informing them about educational opportunities in the United States.
- Challenges to virtual and social media usage include power outages, which are common in Gaza, Iraq, Libya, Syria, and Yemen; connectivity issues; and Internet restrictions.

In calendar year 2013, EducationUSA in Middle East and North Africa made 1,156,754 contacts.



158,439 contacts made through advising centers		363,248 contacts made through outreach activities		635,345 contacts made through virtual platforms*	
Advising Center-based Contacts	157,347	Education Fairs	55,117	Social Media Platforms	633,940
U.S. Institution Representative Visits	814	American Corners / Centers	1,483	Webinars / DVCs	1,405
		Local Universities / Secondary Schools	29,271		
		Other Fairs / Conferences / Seminars	12,955		
		Host Government Events	258,222		
		Embassy / Consulate Events	2,066		
		Public Locations	1,602		
		Other Activities	2,532		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

Some large files can be difficult for students to open. U.S. higher education institutions can send promotional videos and other large electronic files directly to EducationUSA Advising Centers where students can open and view them more easily.

SUCCESSFUL RECRUITING STRATEGIES

- Translate your website into Arabic, Persian, or Kurdish and record videos of your students from the Middle East and North Africa as a means to engage parents and students with limited English language skills. Provide more visual information about living on campus. Particularly at the undergraduate level, students want to see what living arrangements are like. Highlight institutional support and student services (academic, extracurricular, social) for those students who bring families and chaperones, as well as those who travel alone. Conduct focus groups with new students to ask them about how to simplify the application and settling-in process.
- Keep family members in mind. They play an important role in the decision making. Many graduate students will be in the United States with their families and prefer institutions that provide support for households.
- Leverage word of mouth as it is particularly important in the region. Cultivate relationships with current international students and international alumni and visit with alumni when recruiting abroad. Alumni, many of whom are in high-ranking positions in the public and private sectors, appreciate the opportunity to engage with admission officers from their alma maters.

**Leveraging
word of mouth**
is particularly important
in the MENA region

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. EducationUSA Advising Centers plan local events throughout the year.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions can capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff

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ADMISSIONS

(subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit local high schools or colleges. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- **EducationUSA Pavilion at the International Exhibition and Conference on Higher Education:** April 15-18, 2014 (Riyadh, Saudi Arabia), participate in the EducationUSA Pavilion at IECHE, the largest government-sponsored education expo in the Gulf.
- **EducationUSA Iraq:** April 2014 (Erbil) and September 2014 (Baghdad), EducationUSA advisers provide an opportunity for students from Iraq to meet directly with U.S. university admissions representatives.
- **EducationUSA Pavillion at NAJAH:** October 28-30, 2014 (Abu Dhabi, United Arab Emirates), participate in the EducationUSA Pavillion at NAJAH, the official government-sponsored educational expo.

CENTER EVENTS

- EducationUSA hosts regular webchats and video conferences for students and advisers. Advisers hold short, online discussions about different programs of study and undergraduate and graduate admissions issues faced by MENA students.
- All centers conduct pre-departure orientations in June or July. Some centers in the Gulf also conduct orientations in January. U.S. institutions can alert their accepted students to check www.EducationUSA.state.gov or contact their local EducationUSA center for exact dates and times.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

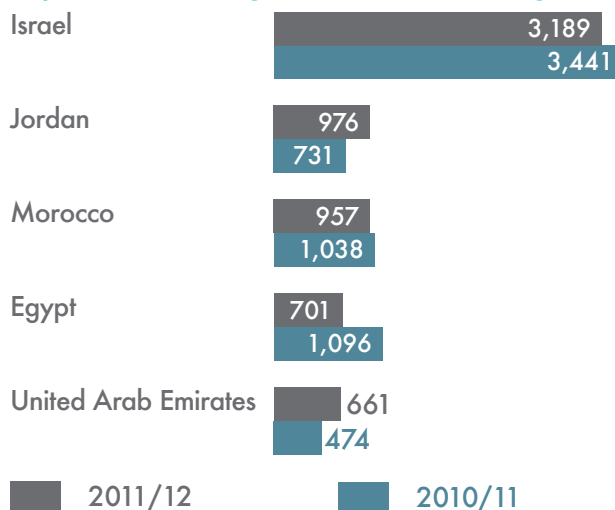
- Best times: October–December, February, April–May
- Worst times: June–October (summer, Ramadan/Eid breaks)
- Exam periods and religious holidays can vary as not all countries (and school systems within countries) are on the same academic timetable. Advisers will work with you to accommodate your needs and plans throughout the year.

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

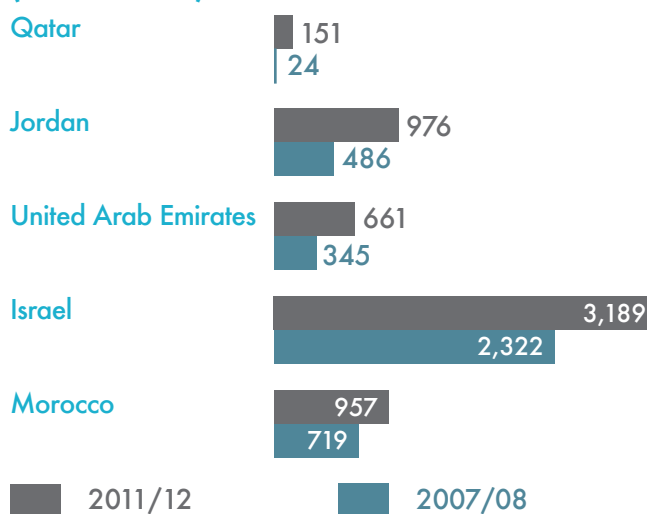
U.S. STUDY ABROAD IN THE REGION

The number of U.S. students studying in the MENA region has generally been relatively small compared with the rest of the world. The region hosted only 3 percent of all U.S. study abroad students in academic year 2011-2012. Israel, Jordan, and Morocco are the top three hosting countries with once-popular Egypt falling by 36 percent. While EducationUSA advising centers in the region do not host study abroad programs, they do offer internship programs and are eager to work with U.S. student volunteers. U.S. study abroad offices can inform students about connecting with EducationUSA. Offices that have internship opportunities include those in Alexandria, Beirut, Cairo, Rabat, Ramallah, and Tel Aviv.

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



SOUTH AND CENTRAL ASIA

Afghanistan, Bangladesh, Bhutan, India, Kazakhstan, Kyrgyzstan, Maldives, Nepal, Pakistan, Sri Lanka, Tajikistan, Turkmenistan, Uzbekistan

28 EducationUSA Advising Centers in the Region:

16	Comprehensive
10	Standard
2	Reference

REGIONAL EDUCATIONUSA PROFILE

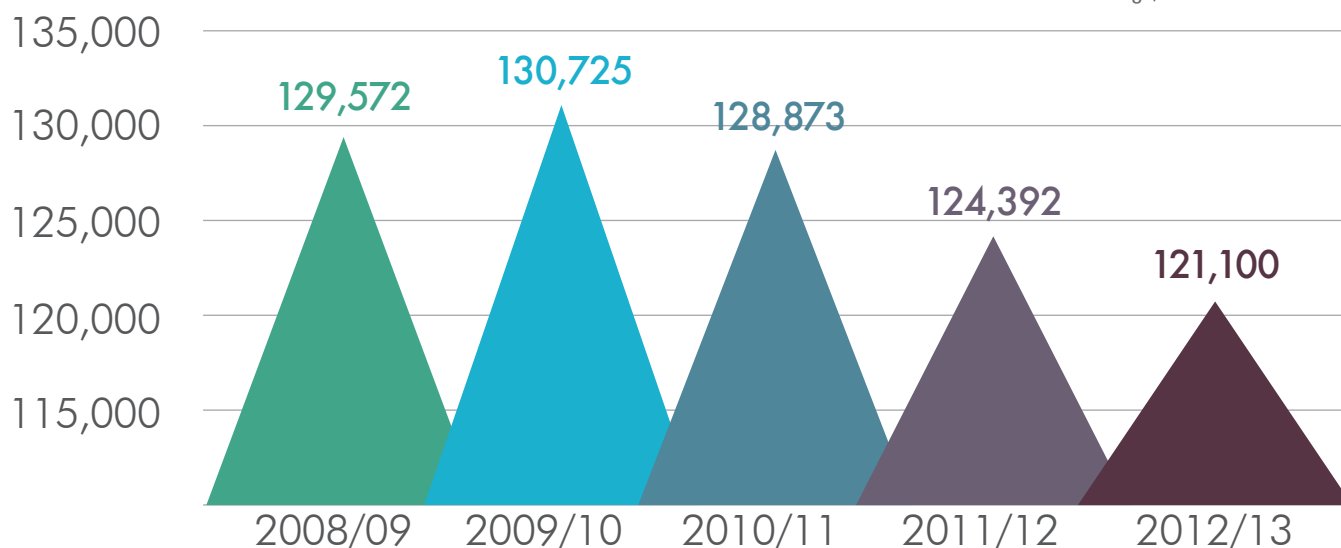
Advising centers in South and Central Asia are located in U.S. embassies or consulates, Fulbright Commissions, American Councils/ACCELS offices, and non-profit organizations. EducationUSA's credibility in South Asia is closely linked to the U.S. diplomatic mission and the reputation of host institutions. New EducationUSA advising centers opened at the United States-India Educational Foundation (USIEF) in Hyderabad in January 2014 and at the American Center in Bishkek, Kyrgyzstan, which is inside the Bayalinov Youth and Children's Library, in September 2013. EducationUSA centers in Bishkek, Osh, and Karakol in Kyrgyzstan are now closed.

Opportunity Funds, which support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions, are currently available through EducationUSA advising centers in Bangladesh, Kazakhstan, Nepal, Pakistan, Sri Lanka, Tajikistan, Turkmenistan, and Uzbekistan.

Students are collecting and sharing an increasing amount of information online. EducationUSA advising centers in South Asia have prioritized outreach in close collaboration with Public Affairs Sections of embassies and consulates. Representatives from U.S. higher education institutions (HEIs) assist with invaluable webinars where they address advisers, students, and high school counselors. In addition, their in-person visits

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.





to advising centers allow EducationUSA to showcase institutions and allow personal interaction with students, parents, and high school counselors.

REGIONAL OVERVIEW

The youth populations in South and Central Asia are the largest in the world, showcasing the region's cultural and geographic diversity. People-to-people ties and international exchanges of students are of crucial importance in this priority region.

India and Nepal retained their rank) this year among the top 25 countries in the world sending undergraduate students to the United States for higher education. Within the region, India ranks first as sending the most students followed by Nepal, Pakistan, and Bangladesh.

South and Central Asian countries continue to face many economic and societal challenges. The effects of climate change and the urgent need for renewable energy and clean water are immediate in most of SCA. Unplanned urban development in most countries leads to a quest for sustainable living, and the disparity between rich and poor, young and old, male and female is increasingly in the news. The transition from urban to rural and shortages in electricity, fuel, and water cause great stress on existing infrastructure. Trained specialists in fields of sustainability, water management, law, engineering, and social service fields are required to meet these challenges.

Disruptions in the supply of electricity in the region can mean as much as 16 hours a day without electricity during the winter, impacting students' ability to access Skype and on-line applications.

RECENT TRENDS

- South and Central Asia provides a rich source of potential students for recruitment to U.S. institutions, and the United States continues to garner high interest as a study destination. According to the *Open Doors* 2013 report, Nine countries in South and Central Asia experienced increases in the number of students studying in the United States. Exceptions were India, Nepal, Turkmenistan, and Uzbekistan.
- Increasing numbers of students are seeking admission to degree programs in countries other than the United States. There are multiple factors causing this, including aggressive marketing by some foreign universities.
- Students in the region have an increased interest in short-term programs and community colleges; students in Central Asia have shown increased interest in English language programs.
- In 2012, Kazakhstani universities launched the Academic Mobility program, which is similar to a semester-abroad program but often shorter than a semester. Students' home universities often partially fund the program, but students are responsible for finding a host institution.

COUNTRIES IN THE SPOTLIGHT

India: The United States dominates the foreign education market in India. Indians firmly believe that the United

States has the highest quality higher education with the widest range of programs and the best research options. It is not a question of “Why study in the United States?” but “How to study in the United States.” Although India is still a graduate market, interest in undergraduate education is rising. This trend is fueled by intense competition for limited seats at respected institutions in India. A number of international schools offering the International Baccalaureate have opened across India. Prep schools that traditionally focused on preparing their students for the entrance exams to the Indian Institutes of Technology and other prestigious colleges in India have begun to offer a parallel track—preparing students for study at foreign, primarily American, institutions. Twinning programs and transfer options are of great interest to Indian students, given the attractive possibility of lowering the overall cost of an education. Community colleges are similarly attractive destinations for the same reason. India’s Ministry of Human Resource Development, which oversees Indian higher education, looks toward the U.S. community college model as a means to educate and train youth to respond to workforce needs.

Kazakhstan: U.S. universities will find a strong target of opportunity in Kazakhstan. It is a rapidly developing, politically stable, oil-rich, ethnically diverse nation that has tripled its GDP in recent years to around \$13,000 per capita. This puts it at the same level of affluence as Bulgaria, South Africa, and Costa Rica. Young people actively study English—many universities conduct all coursework in English—and are very eager to study abroad. The government recently announced plans to close many local private universities; thus, the number of students seeking high-quality education overseas is forecast to increase dramatically. Kazakhstan sends 37,000 self-paying undergraduate and graduate students overseas every year, but only around five percent choose to study in the United States.

Kyrgyzstan: Demand for skilled and professional workers in the fields of manufacturing, construction, medicine, financial activities, and metallurgical production is high in Kyrgyzstan. Most often workers with a European or U.S. education receive hiring preference. Kyrgyz youth demonstrate a desire to pursue their studies abroad, preferably in the United States. Secondary students are well prepared to enter U.S. universities and have received compulsory English training. In recent years, there has been increased interest in community colleges due to lower costs and transfer opportunities.

Nepal: Political disturbances continue to impact academic programs in Nepal, prompting students to seek educational opportunities abroad. Secondary education

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	% Change from 2011/12
India	96,754	-3.5%
Nepal	8,920	-7.3%
Pakistan	4,772	3.7%
Bangladesh	3,828	15.5%
Sri Lanka	3,046	5.0%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
Bangladesh	2,706	3,828	41.5%
Bhutan	109	133	22.0%
Kazakhstan	1,714	1,969	14.9%
Afghanistan	407	449	10.3%
Sri Lanka	2,976	3,046	2.4%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

41.5%

Bangladesh has the largest percentage growth in the region over the last five years (with over 100 students)

has become more accessible, resulting in increased numbers of students graduating from high school every year and a growing interest in studying abroad. Most students have strong levels of English. Almost all need scholarships to make U.S. higher education affordable. Nepali students apply en masse to study in countries where it is perceived to be easier to obtain a student visa.

Pakistan: More than 34,000 Pakistan students currently study abroad. The major cities of Karachi, Lahore, and Islamabad/Rawalpindi have large populations of students who apply to study abroad, but cities like Faisalabad, Sialkot, Gujrat, and Gujranwala also have prospective students interested in pursuing higher education at foreign universities. Universities planning to recruit in Pakistan are recommended to broaden their selection of target cities. The Global Undergraduate Exchange Program is administered at the U.S. Educational Foundation in Pakistan, which hosts the EducationUSA advising center. Since 2010, hundreds of students from Pakistani universities have studied at U.S. campuses for a semester or a year through this short-term exchange program. Upon return, these students finish their bachelor's degrees at Pakistani universities and, as they share with peers their positive experiences, they influence opinions and shape the mobility trends among Pakistani students toward U.S. academic programs. Pakistan hosts around 15-20 television news channels and, with increased internet usage, Pakistani youth are well informed and more politically aware than ever.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

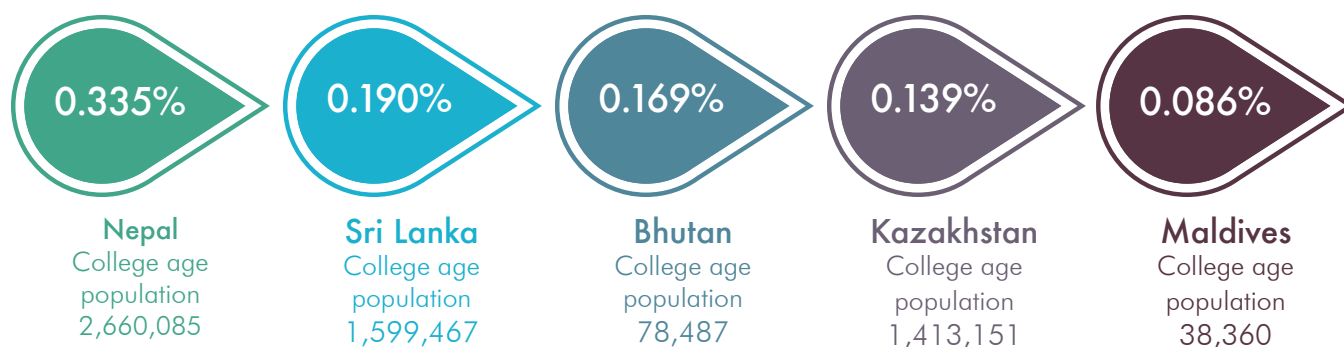
- An analysis of F-1 visa issuance trends in India signals that the total number of Indian students in the United States should increase in the next two to three years.

- Competition for the limited number of seats at respected undergraduate institutions, particularly for engineering and business, may result in an increase in undergraduate applicants to the United States. Targeted recruitment efforts will yield measurable results.
- There is tremendous potential for transfer applicants and twinning programs in India.
- The Community Colleges for International Development (CCID) initiative in India and Pakistan is increasing the number of students enrolled in two-year programs. Interest in other low-cost or short-term programs will rise as students seek affordable U.S. credentials.
- EducationUSA promotes MOOCs every year, and the success of that effort could lead many students in the region to seek additional on-line experiences with U.S. universities.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- **Kazakhstan:** The Ministry of National Education Scholarships provide full funding for study in the United States, including a monthly stipend for living expenses, a return plane ticket, and health insurance. The scholarships can be used for general English studies, master's, and PhD programs, as well as short-term scientific training opportunities (<http://ow.ly/uL6XW>).
- **India** offers several sources of private funding, <http://ow.ly/uL71C>.
- Many governments in South Asia, notably Afghanistan and Pakistan, allocate funding each year for students to pursue their higher education overseas. However,

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

students with government funding often attend schools closer to home in countries such as Turkey and India because of lower tuition, proximity, and similar cultural traditions. Many students desire to study in the United States, and universities able to offer competitive tuition or discounts will have a recruiting advantage.

VIRTUAL AND SOCIAL MEDIA USAGE

Across the region, most students do not have high-speed internet connections, making it difficult to download large files.

- Students in the region increasingly use smartphones and tablets; Facebook, LinkedIn, Twitter, YouTube, and Google continue to be very popular.
- Popular apps in South Asia are WhatsApp, Viber, Skype, and Google+.
- In Afghanistan, few people have regular Internet access. Information is shared over SMS. To send information via SMS about a U.S. institution or program, contact the EducationUSA adviser in Kabul for assistance.
- In Pakistan, YouTube has been banned for over a year. There is some access to the site through proxy servers, but many users have moved to alternative websites like <http://ow.ly/uL78U>.
- In Kazakhstan, social media pages are becoming one

of the strongest components for promoting study programs, scholarships, and EducationUSA center events. Kazakhstani advisers extensively use Facebook and V Kontakte (<http://ow.ly/uL7wl>).

- In Kyrgyzstan, virtual and social networking has become an essential communication tool among 18-35 year olds.

SUCCESSFUL RECRUITING STRATEGIES

- Connect with students through EducationUSA college and university fairs. Parents appreciate the opportunity to meet university representatives, discuss available options, and have their questions answered so they feel well informed when making decisions about where to apply.
- Initiate summer programs for high school students. A positive experience at a summer program encourages students to continue toward a degree program with that institution.
- Connect and meet the EducationUSA advisers at centers in the region. Provide informational seminars that showcase the breadth of U.S. higher education and highlight the strengths of educational institutions about which the public may not be familiar. This subtle promotion of institutions or programs can significantly enhance recruitment efforts.

In calendar year 2013, EducationUSA in South and Central Asia made 1,301,354 contacts.



294,692 contacts made through advising centers		160,099 contacts made through outreach activities		846,563 contacts made through virtual platforms*	
Advising Center-based Contacts	294,258	Education Fairs	72,920	Social Media Platforms	845,970
U.S. Institution Representative Visits	434	American Corners / Centers	7,167	Webinars / DVCs	593
		Local Universities / Secondary Schools	57,301		
		Other Fairs / Conferences / Seminars	8,998		
		Host Government Events	995		
		Embassy / Consulate Events	4,913		
		Public Locations	3,160		
		Other Activities	4,645		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

- Combine multiple partial financial aid awards into larger awards for fewer students. Providing larger awards serves as a magnet to attract good students who in turn share their positive experiences with peers, encouraging them to apply. Word of mouth is the most effective recruiting tool in the region.
- Encourage alumni of your institution to become engaged and represent your college or university at EducationUSA fairs and visit the EducationUSA centers to conduct sessions and meet students.
- Enlist parents of enrolled students to meet parents of prospective students. They can provide a sense of security to families anxious about sending their children abroad.
- Clearly inform prospective students of the options and internship possibilities of Optional Practical Training (OPT). Career prospects greatly influence and pique the interest of applicants in the region.
- Talk to applicants and their parents via Skype or take advantage of multimedia facilities and webinars at advising centers. They will appreciate the opportunity to speak directly to a U.S. university representative or student.
- Expand your list of recruitment cities. EducationUSA can advise on how to effectively go beyond populations in capital cities to reach increasing numbers of young people who have high aspirations for upward social mobility provided by higher education abroad.
- Showcase success stories. Emphasize the value of a degree from your institution, options for affordable financing and scholarships, as well as the successful career trajectories of your alumni.

REGIONAL EDUCATIONUSA EVENTS

Use the EducationUSA website to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often capitalize on these events to receive a country briefing from EducationUSA advisers,

meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA advising center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

South Asia Tour: Join the spring tour through Afghanistan, Bangladesh, Nepal, Pakistan, and Sri Lanka. The tour includes university fairs, school visits, and cultural activities. Supported by U.S. embassies, the tour offers competitive rates and an affordable recruitment opportunity. For details, contact REAC Kathleen Alam: ReacLahore@educationUSA.info.

Bangladesh: The three-day annual U.S. Trade Fair in Dhaka in February is co-sponsored by the U.S. Embassy and the American Chamber of Commerce. It attracts 2,000 to 3,000 visitors and is a good venue to promote your institution to parents of college-bound students. For information, contact Arefin Jahan at EducationUSA in Dhaka: JahanAX@state.gov.

Bhutan: The Bhutan Chamber of Commerce and Industry organizes an annual International Education Fair in Thimphu. In 2014, the event took place in March. For details, please contact REAC Ishrat Jahan: IJahan@educationusa.info.

India: The USIEF-EducationUSA Tour in India is hosted in partnership with IIE. In 2014, the tour will take place September 15-29 across seven cities—Ahmedabad, Bangalore, Chennai, Delhi, Hyderabad, Kolkata, and Mumbai. EducationUSA at USIEF also hosts Alumni Fairs in December/January. For details, contact REAC Ishrat Jahan at IJahan@educationusa.info.

Kazakhstan: Along with the U.S. university fairs organized by the U.S. Embassy in Astana and Consulate in Almaty, EducationUSA centers participate in the International Student Fair (spring, fall), Begin Group International Education Fair (spring, fall) and the Globus Education Fair (winter). In April 2014, the first EducationUSA Tour took place in Kazakhstan, traveling through the student-populated cities of Almaty, Astana, Aktobe, and Shymkent. For details, contact REAC Ishrat Jahan: IJahan@educationusa.info.

Pakistan: The annual Dawn Education Expo in Pakistan runs for one week in February and travels from Islamabad to Lahore and Karachi. It attracts more than 10,000 participants. For information, contact Umair Khan, EducationUSA in Islamabad, at umair@usefpakistan.org.

Turkmenistan: The government sponsors an annual

International Exhibition and Scientific Conference titled “Education, Sport and Tourism in the Era of Power and Happiness” in Ashgabat in November. The EducationUSA advising center reaches thousands of high school and university level students, parents, teachers, professors, and various organizations at this event. For details, contact the EducationUSA center at eac@americancouncilstm.org.

Uzbekistan: The Expocontact Ltd. Company under the Chamber of Commerce and Industry of the Republic of Uzbekistan organizes an annual Education and Career Fair with support from the Ministry of Higher and Secondary Specialized Education of Uzbekistan. More than 30,000 high school students, university students, and faculty attend the fair. In 2014, the fair took place in February. For details, contact the EducationUSA center in Tashkent at Tashkent-Advising@state.gov.

CENTER EVENTS

Check with individual centers to find out what activities they have planned. Some ongoing highlights include:

- **Weekly Group Sessions:** EducationUSA centers host weekly group sessions with local students along with specialized sessions on different topics, such as essay writing.

EducationUSA expands outreach through counselor networks and alumni fairs

- **Outreach:** EducationUSA advisers conduct outreach at local institutions to inform them of U.S. higher education options and application procedures.
- **Counselor Network:** Several countries in the region have formed high school counselor groups, led by EducationUSA advisers, to share best practices and learn more about topics such as student visas, writing personal statements, application timelines, and finding the best institutional fit.



- **Alumni Fair:** Some countries, mainly India and Pakistan, host alumni fairs, inviting students and parents to meet current students and recent graduates of U.S. universities. Universities are encouraged to send materials.
- **Student Peer Groups:** Advising centers work with dedicated groups of students over one to two years to prepare for U.S. university admissions. Departing students invite and mentor new students at the center.
- **Test Prep Programs:** Some countries organize and mentor groups of students in preparation for standardized tests.
- **Webchats:** Centers host regular webchats on Facebook and other social media platforms.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

In Muslim majority countries, avoid the month of Ramadan.

Afghanistan: April -June and August-October, except in the southern provinces of Kandahar and Nangarhar, where best times are September-December and February-April.

Bangladesh: February-March.

India: April-December and also in January-February. School and college examinations normally take place between February and April.

Kazakhstan: September-May is a good time for school visits. October, November, February, and March are fair times. Avoid summer, the first 10 days of January, and the last week of March as they are all school breaks.

Kyrgyzstan: September-November, February-April. Exams take place in December and January, May and June. Consider joining EducationUSA Fairs in September and October.

Nepal: Avoid the largest Nepali festival period, which typically falls in October. During this time, schools and colleges are closed and many students will travel home.

Pakistan: September-January.

Sri Lanka: Avoid April and August. The best times to engage are July after exams and October after exams.

Tajikistan: February-April and October-November. Join education tours in April or during International Education Week in November.

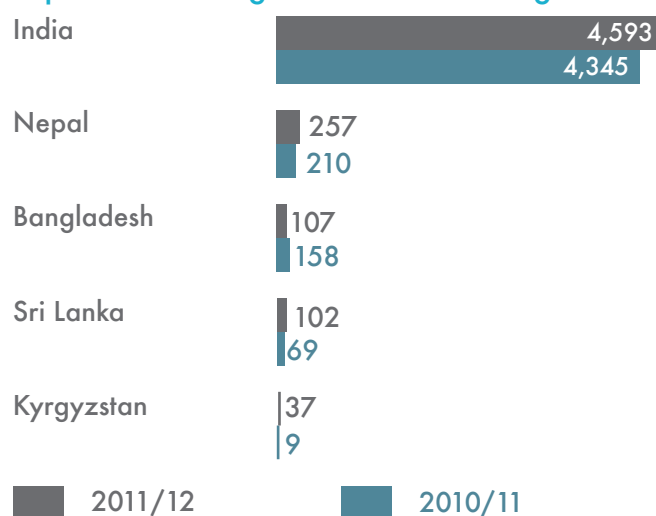
Turkmenistan: August-November, April-June.

U.S. STUDY ABROAD IN THE REGION

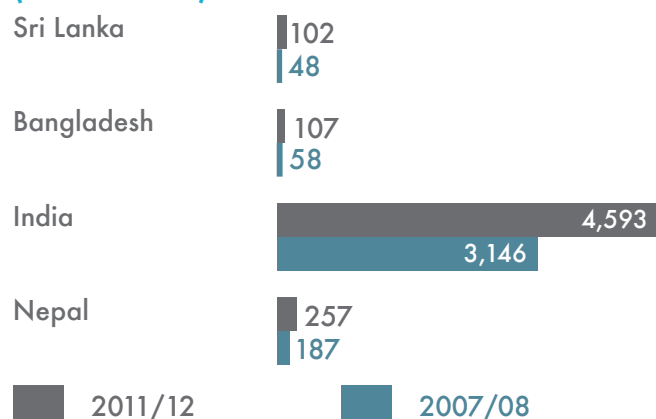
India is the only SCA country in the top 25 *Open Doors* destinations for U.S. students. Six percent more U.S. students studied in the region in 2011-2012 than the previous year (4,921 in 2010-2011). Kyrgyzstan, Nepal, Sri Lanka, and Tajikistan had increases of at least 20 percent in the number of U.S. students studying there over the previous year.

The State Department continues the Passport to India initiative (<http://ow.ly/uL7gF>). Private-sector funding supports business internships linked to students' academic interest areas, summer scientific research internships, and service learning internships in India.

Top Five Receiving Countries in the Region



Four Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*, 2009-2013.

WESTERN HEMISPHERE

Anguilla, Antigua and Barbuda, Argentina, Bahamas, Barbados, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Dominica, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Uruguay, Venezuela

**122 EducationUSA
Advising Centers
in the Region:**

59 Comprehensive
50 Standard
13 Reference

REGIONAL EDUCATIONUSA PROFILE

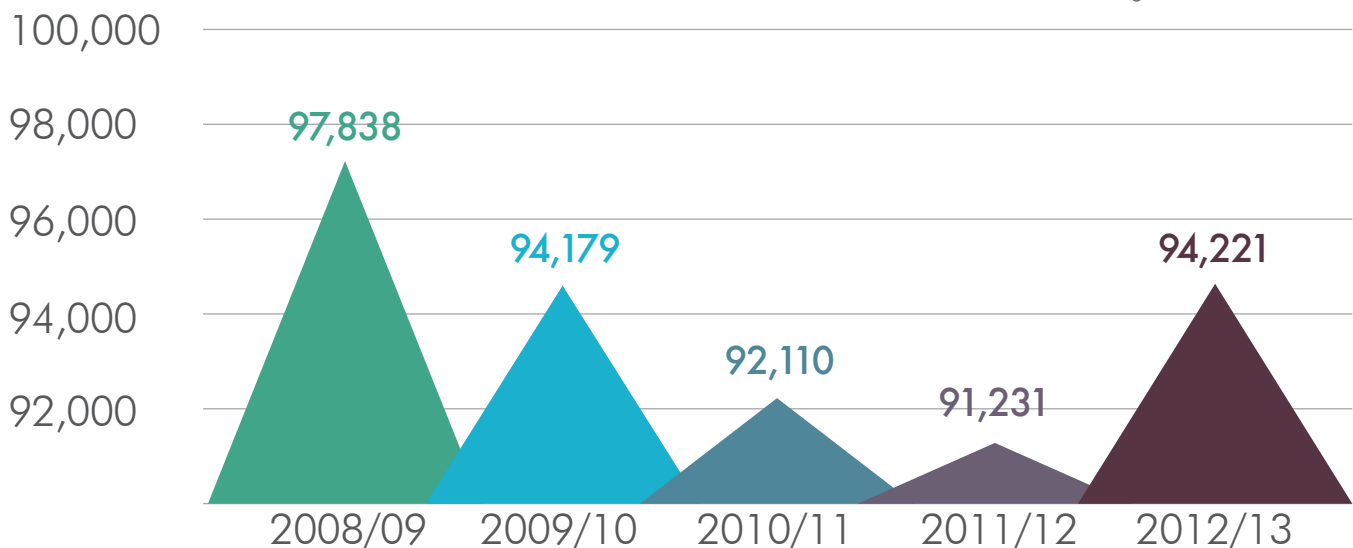
Nine new EducationUSA Advising Centers opened within the last year in Bahamas (one), Brazil (six), Uruguay (one), and Venezuela (one), further expanding the network's reach in the region. Opportunity Funds that support talented, economically disadvantaged undergraduate and graduate students with the upfront costs of applying to U.S. institutions are currently available through EducationUSA Advising Centers in Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Paraguay, and Venezuela. EducationUSA has conducted extensive outreach to broadcast

Opportunity Funds to both prospective undergraduate and graduate students. Through EducationUSA competitive college clubs in Argentina, Mexico, and El Salvador, advisers meet on a regular basis with top high school students to guide them in the college application process. Monthly meetings and individual appointments are held to work with students as they find the best institutional fit to meet their needs academically, socially, and financially.

Advisers in the Western Hemisphere are keen on using social media to disseminate information about U.S. higher education to local students. To reach larger numbers, advisers are leveraging Facebook to advertise EdUSA Connects webinars, visits to centers by U.S. university representatives, and the EducationUSA *Weekly*

Student Mobility (5-Year Trend)

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.





Update. Argentina, Brazil, Canada, Chile, Colombia, Ecuador, Paraguay, Peru, and Venezuela use social media to organize outreach activities to less frequently visited cities and provinces to promote EducationUSA services to new student audiences. Advisers are using technology to electronically target their online services and marketing efforts to nontraditional audiences in remote locations like Patagonia and the Amazon. In the past year, advisers throughout the western hemisphere hosted 326 EdUSA Connects webinars to link U.S. college and university representatives with local students to inform them about U.S. higher education.

Advising centers in Brazil and Chile partnered with local governments to advertise undergraduate and graduate foreign government study abroad scholarships. They promoted these opportunities in local languages, encouraging students in these countries to apply to U.S. universities. EducationUSA in Brazil received over 53,000 views of virtual tutorials to help students to fill out the Common Application, tips for testing, essay writing, and more. Advisers offered online pre-departure orientations (PDOs) with the Institute of International Education (IIE) countrywide for 5,500 Brazilian students going to the United States on the Brazilian Scientific Mobility Program (BSMP) in the last quarter. EducationUSA Chile conducted outreach sessions with the Chilean government to promote the United States as a destination for BECAS Chile scholarship holders. They have also paved the way for U.S. universities and associations to interact directly with BECAS Chile and establish government-to-government and government-to-university relationships to increase student mobility to the United States.

Local universities in the region are interested in developing partnerships with U.S. universities. EducationUSA advisers facilitate contact between local and U.S. universities through workshops on the standards of best practices for study abroad in Brazil, Chile, Colombia, Mexico, Peru, and El Salvador. Several U.S. higher education associations actively engage with the higher education leadership in Brazil, Chile, Mexico, and other Central American countries to establish new guidelines for campus internationalization. EducationUSA advisers promoted match-making events, inviting U.S. associations and universities to participate in key local conferences and establish direct partnerships for student mobility to and from the United States.

REGIONAL OVERVIEW

Canada, Latin America, and the Caribbean make up the Department of State's Western Hemisphere region (WHA), a diverse region that covers 29 percent of Earth's land area, spreads over 35 countries, and boasts a combined total population of approximately 900 million. With five countries among the top 25 sending countries of international students to the United States (Canada, Mexico, Brazil, Colombia, and Venezuela), and 94,221 students from the region in the United States during the 2012-2013 academic year, western hemisphere countries are second only to Asia in terms of international student mobility to the United States. The flow from Latin America and the Caribbean has been influenced by the broad support and funding for study abroad that a number of countries (Brazil, Chile, Colombia, Dominican Republic, Ecuador, and Panama) currently

provide, as well as by growing and stable economies in major sending countries, including Brazil, Colombia, and Mexico. More than 51 percent of students from the region study at the undergraduate level and close to 33 percent of students study at the graduate level. More than 16 percent are non-degree seeking or enrolled in Optional Practical Training (OPT).

Brazil, Chile, and Peru dramatically expanded their economies through natural resource extraction industries, including petroleum, natural gas, and mineral mining. Panama's economy is growing steadily through IT and canal-related industries. Mexico's energy, automotive, aeronautical, and manufacturing industries continue to grow exponentially, strategically targeting cross-border opportunities. As a result, Brazil, Chile, Mexico, Peru, and Panama have allocated substantial resources to develop creative industries while also expanding science, technology, and innovation initiatives through international exchange. This trend has also resulted in increased efforts to internationalize local universities and research centers, and to support the opening of U.S. branch campuses and representational offices in the region. In Brazil, Chile, and Mexico, for example, investment in creative industries is bringing together academia and industry through international university partnerships. In Mexico and Central America, workforce development is becoming a priority in bilateral dialogues with a resulting focus on partnerships between non-traditional institutions, such as technological universities and community colleges. Education is front and center as a key priority at U.S. embassies in Latin America.

canal-related industries. As a result, Brazil, Chile, Peru, and Panama have allocated substantial resources to develop creative industries (from entertainment to game design), while also expanding science, technology and innovation initiatives through international exchange. This trend has also resulted in increased efforts to internationalize local universities and research centers. In Brazil and Chile, for example, investment in creative industries is bringing together academia and industry through partnerships between foreign universities in an unprecedented way. The U.S. Mission in Brazil has named education its number one priority.

RECENT TRENDS

- In March 2011, President Obama announced his 100,000 Strong in the Americas initiative to increase the number of Latin American and Caribbean students studying in the United States and vice versa to 100,000 by 2020. As the initiative grows, it will foster region-

Regional Student Totals by Top 5 Countries of Origin

Country Name	2012/2013	% Change from 2011/12
Canada	27,357	2.0%
Mexico	14,199	2.2%
Brazil	10,868	20.4%
Colombia	6,543	3.9%
Venezuela	6,158	-2.0%

Five Countries of Origin (with over 100 students) with Highest Percentage Growth, International Students (5-Year Trend)

Country Name	2008/09	2012/13	% Change
Venezuela	4,678	6,158	31.6%
Dominican Republic	1,387	1,803	30.0%
Brazil	8,767	10,868	24.0%
Honduras	1,226	1,513	23.4%
Chile	1,953	2,349	20.3%

Source: Institute of International Education, funded by a grant from the U.S. Department of State, Open Doors Report on International Educational Exchange, 2009-2013.

31.6%

Venezuela has the largest percentage growth in the region over the last five years (with over 100 students)

wide prosperity through greater international exchanges of students—our future leaders and innovators.

Currently, South America (Andes and Southern Cone) sends 37 percent of Western Hemisphere students to the United States, followed by Canada with 29 percent, Mexico and Central America with 22 percent, and the Caribbean with 12 percent.

- 100,000 Strong in the Americas publicizes grant competitions that support student mobility in the region. EducationUSA advising centers share this information with local higher education contacts. <http://ow.ly/uL1Rf> announces the latest information, including current requests for proposals and related news.
- The United States continues to be the region's premier international destination for students despite increasing competition from Spain, Australia, and Western Hemisphere countries (Canada, Cuba, and Chile). The number of Latin American students studying outside of their own countries has increased, as has the flow of students from South American countries to the United States with growing numbers from Barbados, Bermuda, Brazil, Chile, Colombia, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, and Uruguay. The high cost of studying in the United States, the continuing misperception that it is difficult to get a student visa, and the employment possibilities that other countries offer following graduation influence students' decisions to study elsewhere.
- Sustained economic growth in Chile (six percent), Colombia (four percent), the Dominican Republic (four percent), Mexico (four percent), Nicaragua (five percent), and Peru (six percent) is a key factor in driving student mobility (World Bank: Annual Percentage GDP Growth from 2009-2013).
- Due to migratory trends and in-state tuition opportunities, 40 percent of Caribbean students study in Florida and New York. Forty-five percent of Mexican students attend institutions in Texas because of in-state tuition options, geographic proximity, and historical ties (IIE International Student Census Survey data for *Open Doors Report* 2012). Of that 45 percent, nearly half study at U.S. institutions on or near the border, indicating that a large portion of Mexican students are crossing the border to attend classes.
- Argentina and Uruguay have made incorporating technology into education a top priority in national policy, creating the plan Connection for Equality in 2010 that supplies free netbooks to all students and teachers at public high schools throughout the country.

COUNTRIES IN THE SPOTLIGHT

Canada: Placing fifth among the leading countries of origin of international students studying in the United States, Canadian students are now considering study in other countries to complete their academic programs. In an effort to continue the steady flow of students from the northern neighbor, EducationUSA established an advising operation in Canada during 2012 with support from the Fulbright Commission and the U.S. Embassy.

Mexico: During President Obama's visit to Mexico in May 2013, the governments of Mexico and the United States agreed to include education at the forefront of the bilateral agenda by establishing the Bilateral Forum on Higher Education, Innovation, and Research with the objective to further economic and educational opportunities for citizens of both countries and to develop a 21st century workforce for mutual economic prosperity. The Bilateral Forum will bring together government, academia, and society to develop a shared vision on educational and research cooperation and encourage broader access to quality post-secondary education for traditionally underserved demographic groups, especially in science, technology, engineering, and mathematics (STEM). It will also expand student and scholar exchanges, increase joint research in areas of mutual interest, and share best practices in higher education and innovation. The Mexican government demonstrated a commitment to expanding academic exchanges between the United States and Mexico by increasing funding to the Fulbright-Garcia Robles Scholarships and developing scholarships for foreign academics to travel to Mexico through the National Council of Science and Technology (CONAYCT) to engage in scientific, social, and artistic research.

Panama: The Panamanian government, with the cooperation of the U.S. Embassy and the EducationUSA advising center, supported the establishment of one of three regional centers around the world to provide training for hearing-impaired students. This initiative included an agreement between a U.S. and a Panamanian institution to allow faculty exchanges for teacher training, expanding student mobility in the future. IFARHU, the Panamanian government organization that awards grants and scholarships, has awarded three scholarships for this first year of the program.

Brazil: Since the launch of the Brazilian Scientific Mobility Program (*Ciencias Sem Fronteiras* in Portuguese), Brazil has sent 46,000 students abroad and aims to

send 101,000 students abroad over the next four years. The primary goal of the program is to promote the expansion of science, technology, and innovation through international exchange. The United States is the leading destination for these students with 26,000 scholarships for one-year-undergraduate and four-year-PhD funding. New initiatives include partnerships with Historically Black Colleges and Universities (HBCUs) and community colleges, a new intensive English-language component with ESL for two or six months prior to the regular one-year study abroad program, and the new professional master's programs that aim to send 1,000 students to the United States this year. The Brazilian government has also launched an English without Borders in-country program to prepare students to study in English-speaking countries, and 43 ESL intensive English classes at federal universities, reaching 91,000 students; see <http://ow.ly/uL2D9> for further information on the undergraduate program and <http://ow.ly/uL2vY>. EducationUSA advisers in Brazil created a blog in Portuguese with links to the Brazilian governmental agencies websites where students can search for U.S. universities granting PhD degrees in the sciences: <http://ow.ly/uL2JI>.

Ecuador: The Government of Ecuador's ambitious higher education law seeks to increase the number of faculty members at local universities with advanced degrees. In support of this effort, the National Secretariat of Higher Education, Science, Technology, and Innovation (SENESCYT) provides a scholarship program that sponsors PhD and post-doctoral students abroad. A total of \$217,000 is available to individuals for a doctoral program. In addition, the Ecuadorian government has made scholarships available for undergraduate and graduate study abroad. (<http://ow.ly/uL2Rf>).

Venezuela: To ensure that all qualified, prospective students in Venezuela receive guidance and access to information about U.S. higher education programs and that the country continues to keep a place among the top sending countries, EducationUSA established a second comprehensive EducationUSA Center in Caracas with the support of the U.S. Embassy and the Caracas binational center, the *Centro Venezolano Americano*. Expansion of the EducationUSA network of advising centers to other sites in the country is under consideration.

WHAT TO EXPECT IN THE NEXT THREE TO FIVE YEARS

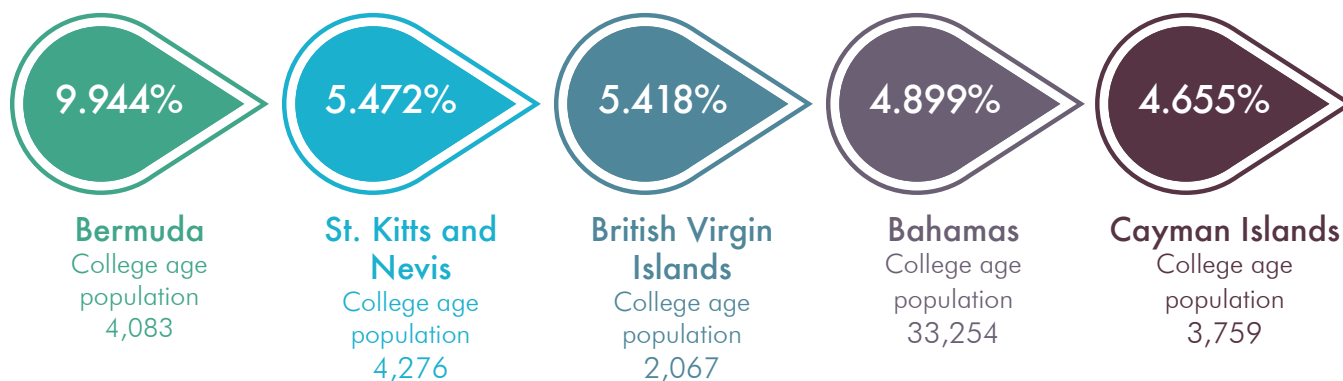
North & Central America and the Caribbean

- To support the recently launched Bilateral Forum on Higher Education, Innovation, and Research between Mexico and the United States, the Mexican government has drafted a proposal called Towards 100,000 to support academic and research mobility of 100,000 Mexicans and 50,000 U.S. citizens by 2018. The proposal includes a variety of exchange programs at the undergraduate, graduate, and post-doctoral levels, as well as internships and language preparation. The bulk of these exchanges will rely on short-term stays. Funding to support this initiative will combine public and private sector donations from both countries.
- The Caribbean Examinations Council (CSC), which oversees curriculum, standardized exams, and diplomas on 19 English- and Dutch-speaking islands, continues to seek articulation agreements with U.S. institutions to facilitate the transfer of credit for CAPE exams (equivalent to A Levels) and CXC associate degrees. As a result, participating U.S. institutions will be in a position to increase the number of Caribbean students studying on their campuses.
- Panamanian and Dominican students continue to express interest in studying in the United States and in options for fully-funded undergraduate and graduate scholarships through their governments' Ministries of Science, Technology, and Education.
- Martinique, Montserrat, and Netherland Antilles, traditionally Eurocentric, have shifted interest in to the United States as a study destination, due to financial support, accessibility, and proximity with resulting significant increases in mobility.
- As workforce development continues to be a priority for most Central American countries, interest in short-term certificate programs and partnerships between technical universities and community colleges will continue to grow.
- Look for the new Pacific Alliance (Chile, Colombia, Mexico, Peru with Costa Rica also requesting admission) trading bloc. The organization's goals include free trade and economic integration among the member states, as well as a visa-free travel area, a common stock exchange, and common diplomatic representation. Educational agreements will also be part of the initiative.

South America: Andean Region

- Since the Peruvian government launched the *BECAS 18* scholarship program in 2012, designed to provide academically talented, economically underprivileged students with funding for undergraduate study and post-secondary technical study, the program has assisted over 11,000 students throughout the country, according to Peru's Ministry of Education <http://ow.ly/uL3vY>. With emphasis on undergraduate programs in STEM, especially in engineering fields, qualified students apply for admission to any of the participating universities throughout the country. Numbers in this program will grow for at least the next two years and, with access to English language instruction provided for the *Becas 18* students through their university programs, future demand for graduate programs abroad is expected to increase sharply. While the initial stages of the program provide funding for university study in Peru, graduate and undergraduate study in other countries is a future component. Peruvian government scholarships for graduate study at the master's and PhD levels are also available, and it is expected that more recipients of that aid will matriculate in universities in the United States.
- The Ecuadorian government's ambitious funding program for graduate and undergraduate study requires that universities increase the number of faculty with PhDs and provides generous funding for doctoral study abroad for university faculty (*Becas Docentes Universitarios*). An additional program, Universities of Excellence (*Universidades de Excelencia*), funds both undergraduate and graduate study in the STEM fields, while a third program referred to as Open Call (*Convocatoria Abierta*) assists students at the master's and PhD levels. All three programs focus on the STEM fields. Funding for social science programs is strictly limited and granted only to students with admission to a short list of approved institutions of higher education around the world. Students are required to gain admission to approved institutions, and the majority of these are U.S. institutions. The number of Ecuadorians at the graduate level in the United States will increase significantly, thanks to these programs.
- The Ecuadorian government's plan to build a city of knowledge, named Yachay, constitutes another positive development for study abroad in the region. The new Experimental Scientific University, the centerpiece of the future city, will concentrate on developing five key areas: life sciences, information and communication technologies, renewable energy and climate change, petrochemistry, and nanoscience. The university will offer only graduate and postgraduate programs. Public research institutions, as well as national and international firms that specialize in the production of high technology, are also expected to be based in the new city.
- The Colombian foundation COLFUTURO continues to offer up to 1,500 loan-scholarships to Colombian students to study abroad each year and provides loans of up to \$25,000 per year for qualified graduate students. Twenty-five percent or more of the recipients of this funding are expected to matriculate in graduate programs in the United States.
- Small decreases in numbers from Venezuela due to government restrictions on currency exchange can be expected in the foreseeable future.

Five Countries of Origin with Highest Per Capita College-Age Student Mobility to the United States



Sources: UNESCO Institute for Statistics, Education Table 2 "Demographic and economic data"; School age population-Tertiary- Total for 2011, 2012, and 2013, available at <http://stats.uis.unesco.org/unesco/TableViewer/tableView.aspx?ReportId=173>. This chart excludes countries that had no data available or were not reported by UNESCO. Student totals from Open Doors 2013.

South America: Southern Cone

- Due to the Brazilian Scientific Mobility Program, U.S. colleges and universities have an unprecedented opportunity to recruit Brazilian students, not only in STEM fields, but also in creative industries (communication, journalism, law, or any other field related to the innovation industry). The number of Brazilian students studying in the United States will grow each year.
- The Brazilian government seeks to expand existing partnerships as a means to encourage collaboration on strategic projects and university-to-university exchanges. These partnerships are expected to increase the number of U.S. students coming to Brazil as well.
- Argentina is focused on the expansion of the number of U.S. students at Argentine universities. Presently, Argentina is the leading receiving country in South America for U.S. students, whose numbers have increased over the past three years. The numbers are expected to expand even more as more Argentine universities begin to recruit U.S. students, capitalizing on the large presence of U.S. study abroad students on their campuses. Many Argentine universities have expressed interest in forming partnerships with U.S. universities to teach Spanish and Latin American Studies to visiting U.S. students in order to solidify Argentina's position as a top U.S. study abroad destination. The Argentine government has also launched a scholarship program for U.S. study for Argentine students. Undergraduate study in the United States has been on the rise and an increasing number of high school students are contacting EducationUSA centers with interest in pursuing undergraduate degrees in the United States.
- The return of the Bachelet government in March of 2014 with proposed education reform will have long-lasting effects on the Chilean education system. Bachelet started the *Becas Chile* (Chile Scholarships) program, and there are high hopes that the program will be expanded and continue to flourish in her second term. Chile has seen a steady increase of numbers of students going to the United States, both undergraduates and graduates. Accreditation issues and a general frustration with the Chilean higher education system have made studying abroad a priority for many Chilean students.
- Both Uruguay and Paraguay are experiencing an increase in U.S. university visits, and EducationUSA advisers are organizing outreach programs for visitors

in partnerships with the U.S. Embassy. Uruguay had record attendance in the last EducationUSA fair with 2,000 students showing up for a four-hour fair.

FOREIGN GOVERNMENT AND PRIVATE FUNDING

- Argentina: Expect to see continued flow of students from Argentina seeking to study in the United States, in particular master's and doctoral programs, due in large part to the new scholarship BEC.AR, launched in 2012 by the Argentina national government. BEC.AR provides funding for qualified Argentine students to pursue master's degrees in U.S. universities in the STEM areas. The government plans to grant 450 scholarships over a period of four years. The city government of Buenos Aires, following the lead of the Argentine national government, also launched a scholarship program in 2012 offering funding for 20 scholarships per year for master's and PhDs at U.S. universities.
- Bahamas: The Lyford Cay Foundation awards approximately 110 scholarships to Bahamian students for study abroad with 58 percent of these awards for completion of undergraduate studies and 31 percent for technical and vocational training.
- Barbados: The Barbados Scholarships and Exhibitions are merit-based undergraduate scholarships awarded to around 30 students who have received very high scores on the CAPE examinations or in an associate degree program at the Barbados Community College. The scholarship pays for tuition, airfare, and a small stipend of about \$3,500 per year. Students can study at home or abroad. Additionally, the National Development scholarships provide approximately ten scholarships each year in various disciplines based on the training needs of the public and private sectors of the country. Most or all National Development scholars study abroad.
- Chile: BECAS Chile, launched in 2008, is a Chilean Ministry of Education initiative that aims to develop human capital by sending 30,000 Chilean students abroad by 2017. The initiative is focused mainly on graduate studies with a recent emphasis on PhDs in the STEM fields. The Chilean government is actively pursuing state-level agreements in the United States, such as those signed with Massachusetts and California. These MOUs eased the development of Chilean Ministry of Education partnerships with state universities in Massachusetts and California and will

result in increased student mobility. U.S. HEIs will begin to receive students under the Technicians for Chile (*Técnicos para Chile*) government-sponsored scholarship program in the near future. EducationUSA has been working hard to include U.S. universities as a destination for students in this scholarship initiative.

- **Colombia:** In 2012, the Colombian Foundation COLFUTURO offered 988 loans/scholarships to qualified Colombian graduate students to study internationally. Also, as of 2012, COLFUTURO has administered the COLCIENCIAS program which, along with the National Planning Department (DNP) Program, provides funding for study leading to doctoral degrees abroad, primarily in the science, technology, and engineering fields. This program offers financial support for approximately 700 students per year (30 percent to study in Colombia and 70 percent to study abroad) and provides more than \$220,000 per student.
- **Dominica:** The Dominica government awards one Island Scholarship each year to the student who has earned the highest score in the CAPE examinations. Additionally, the Dominica government awards approximately five scholarships annually to the best student in each of the five faculties of the Dominica State College.
- **Dominican Republic:** The Ministry of Higher Education, Science, and Technology (SEESCyT) awarded 1,201 scholarships in 2009 for Dominicans to study abroad at all higher education levels; 10 percent of those students come to the United States. SEESCyT's current priority is to increase funding for graduate studies—especially at the doctoral level—in telecommunications, information technology, engineering, music composition, and film. The Ministry seeks to develop partnerships with U.S. research-focused universities to establish articulation agreements and increase the numbers of their students studying in the United States.
- **Ecuador:** The National Secretariat of Higher Education, Science, and Technology (SENESCYT) continues to provide opportunities for study abroad for both graduates and undergraduates and expects to provide an unlimited number of scholarships over the next few years (<http://ow.ly/uL2Rf>). In addition to the grant programs described above, the Ecuadorian government's Ecuadorian Institute of Credit and Scholarships (*Instituto Ecuatoriano de Crédito Educativo y Becas*) provides qualified students with an additional source of funding through loans that provide a limitless amount of funding to qualified individual students that will cover the entire costs of study in a foreign university.

In calendar year 2013, EducationUSA in Western Hemisphere made 810,613 contacts.



347,087 contacts made through advising centers		273,681 contacts made through outreach activities		163,104 contacts made through virtual platforms*	
Advising Center-based Contacts	341,736	Education Fairs	131,899	Social Media Platforms	159,280
U.S. Institution Representative Visits	2,553	American Corners / Centers	7,616	Webinars / DVCs	3,824
		Local Universities / Secondary Schools	62,066		
		Other Fairs / Conferences / Seminars	41,005		
		Host Government Events	7,152		
		Embassy / Consulate Events	4,376		
		Public Locations	8,101		
		Other Activities	41,005		

* Includes social network page likes, profile friends, or group members; video views; Skype contacts; blog and mini-blog followers; digital video conference participants; and EdUSA Connects webinar participants.

The President of the Republic Scholarships Program (*Becas Presidente de la República*), launched in November 2012, supports graduate study abroad in the STEM fields at both the master's degree and doctoral levels. The Ministry of Education reports that 703 graduate students have benefitted from the scholarship program and are currently studying in other countries (<http://ow.ly/uL4as>). However, only a few of these students are studying in the United States since the Peruvian government has found it challenging to work with the decentralized U.S. system of higher education. The process is further complicated by scholarship application and grant processes that are on a different schedule from U.S. institutions. The Ministry of Education seeks to establish agreements with research-focused universities in the United States that will lead to an increase in the number of Peruvian students studying in the United States. Both EducationUSA and the U.S. Embassy have been energetically working to remove barriers to an increased flow of Peruvian government scholarship students to U.S. institutions.

- Panama: According to the National Secretariat of Science Technology and Innovation's (SENACYT) strategic plan for 2010-2014, the government will award 830 international scholarships for undergraduate and graduate studies (165 bachelors, 415 master's, 250 doctorates) in biological and health sciences, agricultural sciences, communication and information technology, and transportation and logistics. SENACYT seeks to sign articulation agreements with institutions overseas, and the United States is a priority destination.
- Organization of American States (OAS): Students from member countries are eligible for up to \$15,000 in Rowe Fund loans. Scholarships for up to \$30,000 are available at the graduate level throughout the region and for undergraduate studies by students from English-speaking Caribbean countries.

VIRTUAL AND SOCIAL MEDIA USAGE

- EducationUSA advisers actively employ social media. Although the most popular social media platforms vary from country to country, the most common throughout the region are Facebook, Twitter, blogs, and Orkut. EducationUSA Chile has developed a social media campaign about the realities and advantages of studying in the United States. EducationUSA Colombia has developed national social media sites and

Join EducationUSA Fair Tours in South America, Mexico, Central America, and Caribbean

an electronic virtual adviser that is available around the clock for consultations. EducationUSA Mexico City has developed a blog that highlights all U.S. financial aid, as well as local sources of funding in Mexico.

- According to statistics compiled by ITU, the UN agency for information and communication technology (<http://ow.ly/uL4vT>), the western hemisphere has an internet penetration rate of 44 percent with some 274.9 million internet users. Comparing that data to Facebook statistics shows that 70 percent of internet users in the region also use Facebook.
- Internet access speeds in most urban areas are similar to the United States. Rural access may be more limited.

SUCCESSFUL RECRUITING STRATEGIES

- Attend regional college fair tours in South America (September), Mexico (October), Central America (October), and the Caribbean (October/November).
- Interact with students through EdUSA Connects webinars and in-person presentations at advising centers. Make an effort to reach out to EducationUSA advisers from Temuco, Chile to the middle of the Amazon who are not often visited by representatives of U.S. institutions, but have students interested in studying in the United States.
- Use alumni to recruit students, but do not underestimate the value of sending admissions staff to build trust and name recognition. Consult EducationUSA when sending alumni to represent your institution.

- Highlight anecdotes of institutional support and services to which students from the region can relate—culture, history, politics, sports, food, arts.
- Subscribe to the EducationUSA *HEI News* and find out about special conferences in the region that can be integral to student recruitment and the establishment of partnerships.
- Use Spanish-language websites to attract students from government scholarship programs. Contact EducationUSA Argentina about the possibility of placing similar pages in Spanish on your website.

REGIONAL EDUCATIONUSA EVENTS

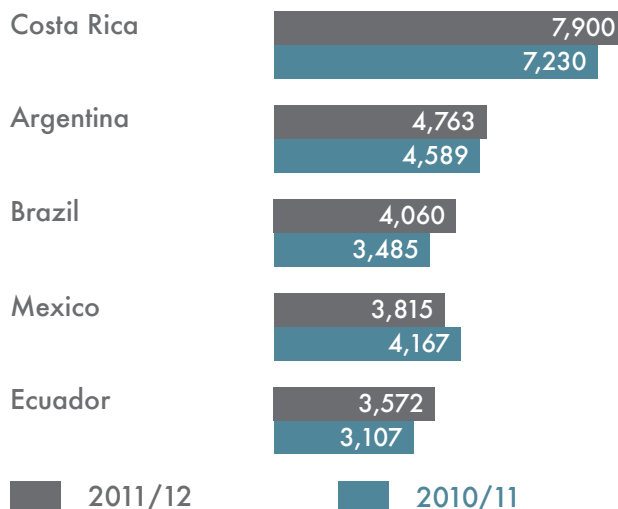
Use the EducationUSA website www.EducationUSA.state.gov and country Facebook pages to find country-specific information about upcoming fairs, webinars, and other events and activities. Several EducationUSA Advising Centers are planning local events during the year.

FAIRS AND CONFERENCES

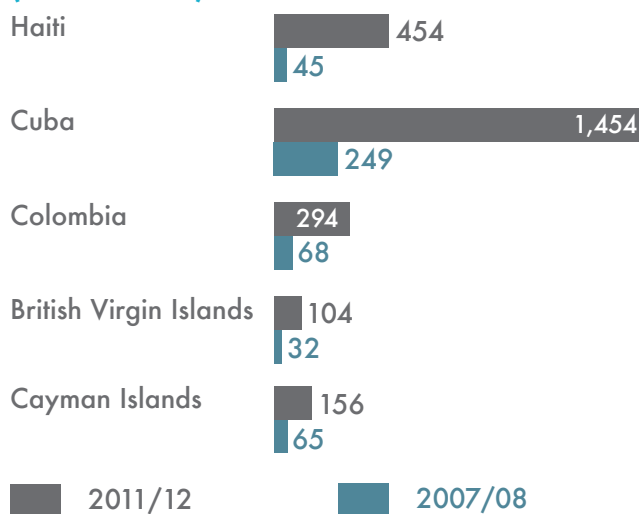
In addition to the many in-person student recruitment opportunities offered through participation in EducationUSA fairs and conferences, representatives of U.S. institutions often also capitalize on these events to receive a country briefing from EducationUSA advisers, meet with U.S. embassy public affairs and consular staff (subject to scheduling availability), make a presentation at an EducationUSA Advising Center, or visit a local high school or college. Contact the EducationUSA staff organizing the event to explore options for maximizing the impact of your participation.

- Caribbean: College Fair Tour; Anguilla, Bahamas, Barbados, Belize, Bermuda, Jamaica, St. Maarten, and Trinidad, late October through early December. More countries will be added and dates will be finalized by May 2014 (<http://ow.ly/uL5M1>).
- Mexico: College Fair Tour; Chihuahua, Mexico City, Guadalajara, Queretaro, Monterrey, Tampico, and Puerto Vallarta, late September through mid-October. EducationUSA Mexico will be coordinating with the different international schools to host open public fairs in Mexico City and Monterrey, supported by the U.S. Embassy. If interested, please, contact ncac@educationusa.info.

Top Five Receiving Countries in the Region



Five Countries (with over 100 students) with Highest Percentage Growth, U.S. Students (5-Year Trend)



Source: Institute of International Education, funded by a grant from the U.S. Department of State, *Open Doors Report on International Educational Exchange*, 2009-2013.

- South America: EducationUSA Fair Tour; Brazil (Brasilia, Sao Paulo, and Río de Janeiro), Argentina (Buenos Aires), Uruguay (Montevideo), Chile (Santiago), Peru (Lima), Ecuador (Quito and Guayaquil), Colombia (Bogotá), and Venezuela (Caracas); August 30-September 21, 2014 (<http://ow.ly/uL5M1>).
- Central America and Dominican Republic: Graduate Studies Fair; Guatemala, Honduras, El Salvador, Nicaragua, Costa Rica, Panama and the Dominican Republic; autumn 2014.

CENTER EVENTS

Check with individual centers to learn more about planned activities. Some ongoing highlights include:

- Participate in EdUSA Connects sessions and webchats with Brazilian Scientific Mobility Program (BSMP) students in Brazil. The EducationUSA country coordinator organizes online sessions with representatives from undergraduate and graduate programs in sciences in U.S. universities to speak to prospective Brazilian students who are applying for the BSMP program. For more information, contact info@educationusa.org.br.
- This year, EducationUSA Mexico will host two summer workshops to train international relations offices staff at local institutions on educational advising practices, U.S. government-sponsored programs, and institutional partnership building. Please contact ncac@educationusa.info if you are interested in taking part and contributing to this program.
- The EducationUSA Advising Center and the U.S. Consulate in Monterrey, Mexico organize alumni fairs. Presenters at these events include consular officers, local authorities, and alumni from U.S. institutions. For more information, contact monterrey@educationusa.info. U.S. Consulates in Hermosillo, Ciudad Juarez, and Nuevo Laredo will also organize alumni fairs reaching out to border state institutions. For more information, please contact ncac@educationusa.info.
- EducationUSA Costa Rica will host its EducationUSA camp once again this summer. This program, supported by the U.S. Embassy, brings students together to train them on essay writing, testing practices, and searching for colleges to fit their needs. This camp is a hands-on approach to preparing students for U.S. college applications. If you are interested in taking part in this camp, please contact costarica@educationusa.info.
- EducationUSA advising centers in Mexico and Honduras facilitated UC Berkeley's College Writing MOOC at their centers. MOOCs are a new tool that advising centers are using to engage with local communities, as well as provide more support services to college-bound international students. If your institution is interested in promoting such programs through EducationUSA, please, contact educationusa@state.gov.
- Several EducationUSA advising centers in the region offer pre-departure orientations, which usually take place in early July and are open to any student accepted to a graduate or undergraduate program at a U.S. university. Encourage admitted students to contact an EducationUSA advising center or check the website for upcoming pre-departure orientations
- Pair up with currently enrolled Latin American students to participate in EdUSA Connects sessions during International Education Week in November 2014. Both the admissions counselors' and current international students' perspectives on studying at U.S. universities make the webinars a great opportunity for prospective students to hear about current students experiences at your university. For more information, contact any EducationUSA advising center in a country you want to target.
- EducationUSA in Argentina and Brazil have successfully implemented a regular U.S. university webinar series and university spotlight in social media. Contact an adviser to coordinate a webinar that can be broadcast to all advising centers in the region. For more information, contact Buenosaires@educationusa.info.
- Among the many programs that have been initiated to engage more Chilean students, EducationUSA Chile opened two Academic Writing Centers (AWCs), in conjunction with the U.S. Embassy and local host universities. The AWC offers free one-hour consultation sessions to any Chilean student interested in applying to a U.S. HEI. Based on the U.S. model that can be found on almost all U.S. campuses, the AWC has benefitted several Chilean students who have shown marked improvement on the writing sections of the SAT, ACT, and TOEFL exams, as well as on the quality of personal statements and essays in their applications.
- Participate in the unique U.S. College Fair organized by EducationUSA Bolivia and the U.S. Embassy, La Paz each year in April. For this fair, U.S. Embassy officials and alumni in Bolivia represent their alma maters with materials sent from their U.S. institutions. Institutions that do not have alumni in Bolivia are welcome to travel to La Paz to participate in the fair or to reach out to students virtually during the event. For more information, contact romeror.eduusa@cba.edu.bo.

BEST TIMES OF YEAR TO INTERACT WITH STUDENTS

Canada: September–November, January–early March, May

Mexico: September–October, January–early March, May

Central America: January–March, September–October

Caribbean: September–November, January–early March

South America (Andean and Southern Cone): March–June, August–November

Avoid the two weeks surrounding Easter for all of Latin America and the Caribbean. Carnival in Latin America, as well as independence anniversaries, should also be avoided through the region. In Brazil, June 2014 will be a World Cup Year and all universities and high schools will be on vacation during this time.

U.S. STUDY ABROAD IN THE REGION

According to the *2013 Open Doors Report on International Educational Exchange*, Costa Rica is the region's top receiving country with 7,900 U.S. students studying abroad, a nine percent increase over the previous year, making it the eighth most popular study abroad destination for U.S. students.

Argentina is the 11th leading destination of U.S. students, receiving 4,763 students and number one in South America. U.S. students in Brazil increased a record 17 percent over the previous year to 4,060,

passing Mexico for the first time in history. Watch for a continual increase in numbers due to the partnerships being established between Brazilian and U.S. universities through the Brazilian Scientific Mobility Program. Ecuador and Chile are also leading host destinations in the region, ranked 16th and 19th, respectively. Peru ranked 24th with a 10 percent increase over the previous year and a 61 percent increase during the last five years. The growth trend for all of the countries mentioned is expected to continue.

Mexico had long been the largest receiving country for U.S. study abroad students; it is currently ranked 15th in the world. Due to concerns related first to the H1N1 outbreak in spring 2009 and to drug-related violence in certain areas of the country, numbers have decreased significantly to 3,815 students in 2011–2012. However, there continue to be many viable institutional options for U.S. study abroad in cities like Mexico City, Merida, Guanajuato, Queretaro and Puebla, among others. U.S. Department of State Travel Warnings provide a state-by-state assessment of security conditions, <http://ow.ly/uL52A>. In addition, the publication *Yes, You Can Study in Mexico* is an excellent resource published and distributed by the U.S. Embassy in Mexico.

Nicaragua, Guatemala, and El Salvador have seen exponential increases in the numbers of students from the United States in study abroad exchanges despite continued travel warnings in the region.

Caribbean countries hosted a total of 6,454 students, a 33 percent increase over the previous year, with the Dominican Republic hosting the largest number (1,554). Other notable countries are Cuba and Haiti.





Email: educationusa@state.gov
Website: www.educationusa.state.gov